ISG Provider Lens™

Google Cloud Partner Ecosystem

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

GFT

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GenAI use cases are under the spotlight

Robust and resilient data infrastructures, data sovereignty, curation of generative AI (GenAI) use cases, and hybrid and multicloud management: these are but a few of the key trends shaping the ecosystem of Google Cloud providers in Europe in 2024 and beyond.

Amid the widespread hype surrounding GenAI, many enterprises still face significant challenges to bring order and structure to their internal data and generally lay a solid foundation for their AI and ML models. Enterprise data is often siloed or stranded across different parts of the organization, incomplete or otherwise of poor quality. Even when data is accessible, further work is usually needed to ready it for ML training purposes. It is in these aspects of modern data management and governance that Google Ecosystem leaders excel. Many ecosystem providers are increasingly helping enterprises move from traditional data warehouse approaches – based on the centralization of often incomplete data – to more modern, AI-driven data meshes, which use ML technologies to search and assemble data from different business domains across the enterprise. With the growth of AI, many providers have established specific units or frameworks to create trusted data environments for ML models, undertaking tasks such as labeling and ensuring compliance with privacy regulations and responsible AI guidelines.

Data sovereignty and regulatory compliance rules are especially important for enterprises operating within Europe. Under the European GDPR, all enterprises operating in Europe – and the service providers supporting them in IT infrastructure – must pay close attention to the intersection of IT infrastructure and data with geographic borders. Specific industries – for example, banking or pharmaceuticals – also have stringent regulatory requirements around the location and processing of data. Data sovereignty is thus becoming an increasingly important aspect of the infrastructure and managed services that leading Google Ecosystem providers in Europe offer.

Data modernization and **GenAI-based use cases** drive demand for Google ecosystem services.

Providers seek to meet data sovereignty concerns in different ways, ranging from region selection and management at a basic level to private cloud solutions on Google Cloud and all the way to specific sovereign cloud offerings on Google Cloud with additional auditing, access management and threat detection systems. Leaders also draw on their industry consulting expertise to create specific industry-compliant services and solutions on Google Cloud.

Google Cloud has long been a popular environment for data and ML workloads, offering a dizzying variety of tools and solutions such as BigQuery, Vertex AI (an AI development platform), TensorFlow (an open-source platform for training and running AI models) and Dialogflow (a platform for developing conversational AI solutions). Some of these tools have been updated with GenAI capabilities via access to Google's Gemini, large language models and a variety of third party (e.g., Anthropic's Claude 3) and open models (e.g., Meta's Llama 2). Nearly all major data analytics and machine learning providers actively use Google Gemini capabilities to create custom-trained models and business solutions.

In general, providers' GenAI enterprise solutions fall into three broad categories. First, ecosystem providers actively use Gemini to improve areas of IT infrastructure and services, such as using Gemini Code Assist (formerly Duet AI for Developers) to accelerate the software development lifecycle through intelligent code creation, completion and testing. Providers are using GenAI in infrastructure operations and managed services, such as intelligent self-service chatbots to help resolve IT incidents or ML models in site reliability engineering (SRE) work for greater contextual understanding of user context in IT performance issues. Second, providers are equipping enterprises with GenAI use cases designed to improve various facets of worker productivity or organizational efficiency, for example, identifying and remediating bottlenecks in supply chains or manufacturing processes or GenAI-powered discovery of new molecular compounds in life sciences. The third category consists of AI-powered use cases designed to improve aspects of CX and generally increase growth in consumer markets, for example, by gleaning marketing insights on pricing or potential churn rates from consumer data, automating smart marketing pitches for product launches or equipping loan origination assistants in banks with AI-powered virtual assistants.

Turning to the infrastructure and managed services space, enterprises in Europe continue to drift steadily toward hybrid and multicloud strategies, as noted in previous reports. Alongside Microsoft Azure and AWS, Google Cloud often forms the third leg of a multicloud enterprise strategy, specifically focusing on data and ML workloads. Although considered more expensive, Google Cloud is often viewed favorably from a sustainability perspective, given its low-carbon energy credentials. This year, ISG also noted a growing focus on Anthos, Google's platform for multicloud management. Many of the leading providers now have considerable experience and expertise in multicloud management, offering managed services that seek to take advantage of the relative flexibility, capabilities and cost differences across the different public clouds. As noted previously, managed service providers in Europe also bring significant expertise in data sovereignty and regulatory compliance rules.

The demand outlook for Google Cloud services in Europe remains robust, with most providers reporting increasing demand within the region. While the industry demand profile varies to some extent by quadrant, country and provider positioning, providers highlighted opportunities in industries such as telecommunications, healthcare, banking, fashion, grocery retailing, pharmaceuticals and broadcasting. Providers also reported significant opportunities in Google Cloud in the public sector, such as public municipalities in the U.K. and Germany. From a functional perspective, providers reported significant demand in areas such as additional security and compliance solutions for Google Cloud, driven partly by the surge in remote work and enterprises' increasing use of IoT solutions. Public cloud costs remain a significant concern for enterprises in Europe, and most providers have enhanced their range of FinOps measures and other cloud management/cost containment solutions in recent years. As noted above, the regulatory environment continues to frame the demand environment for Google Cloud (and other hyperscalers) in Europe in multiple ways. Of particular note is the ongoing investigation by the U.K. Competition and Markets Authority into competition in the cloud services market in the U.K., focusing on the two largest hyperscalers, Microsoft and AWS.[1] Specific issues include cloud data egress costs, the competitive impact of committed spend discounts and potential technical impediments to enterprises adopting multicloud strategies. While Google Cloud does not form part of the referral, the outcome of this investigation could prefigure future regulatory changes in the U.K. market for public cloud services in general and related demand for Google Cloud and its ecosystem of service providers.

Under the European GDPR, all enterprises operating in Europe – and the service providers supporting them in IT infrastructure – must pay close attention to the intersection of IT infrastructure and data with geographic borders. Many providers have developed specific data sovereignty offerings for Google Cloud, such as private cloud offerings or services providing additional auditing, security and access controls.

Provider Positioning

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

Provider Positioning

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	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Deloitte	Market Challenger	Market Challenger	Product Challenger	Product Challenger	Product Challenger
Devoteam G Cloud	Market Challenger	Not In	Product Challenger	Contender	Product Challenger
DXC Technology	Product Challenger	Not In	Product Challenger	Product Challenger	Not In
emergya	Not In	Product Challenger	Not In	Not In	Not In
Eviden (Atos)	Leader	Leader	Product Challenger	Product Challenger	Leader
Fractal Analytics	Not In	Rising Star ★	Not In	Not In	Not In
Genpact	Not In	Product Challenger	Not In	Not In	Not In
GFT	Leader	Leader	Not In	Not In	Not In
Go Reply	Product Challenger	Contender	Not In	Not In	Not In

Provider Positioning

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

Provider Positioning

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	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
oXya	Not In	Not In	Not In	Product Challenger	Not In
PCG	Rising Star ★	Not In	Product Challenger	Not In	Not In
Persistent Systems	Product Challenger	Product Challenger	Not In	Not In	Not In
Promevo	Not In	Not In	Not In	Not In	Contender
Quantiphi	Not In	Leader	Not In	Not In	Not In
Rackspace Technology	Product Challenger	Not In	Product Challenger	Product Challenger	Not In
Revevol	Not In	Not In	Not In	Not In	Product Challenger
Revolgy	Not In	Not In	Contender	Not In	Product Challenger
Sabio	Not In	Contender	Not In	Not In	Not In

Provider Positioning

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

Key focus areas for the **Google Cloud Ecosystem** 2024 study.

Simplified Illustration Source: ISG 2024

- **Implementation and Integration Services**
- **Data Analytics and Machine Learning**
- **Managed Services**
- **SAP Workloads**
- **Workspace Services**

Definition

Google Cloud is enhancing efficiency through advanced ML algorithms. These algorithms analyze historical data and usage patterns to predict future resource requirements, allowing for dynamic resource allocation. Containerization, security and AI are shifting toward a more responsive infrastructure, which aims to optimize performance while minimizing costs. Improvements to containerization technologies, like Kubernetes, are being made. New tools and features (GKE NEG) will streamline containerized applications' deployment, scaling and management, catering to developers and businesses of all sizes. Google's zero trust architecture drives the shift from traditional perimeter-based security models. This approach will integrate multifactor authentication, encryption and the principle of least privilege at every infrastructure layer.

With these deep technical advances, many enterprises struggle to fully integrate and capitalize on the Google Cloud suite of technologies. They, therefore, seek assistance from the ecosystem surrounding Google Cloud, a community of global systems 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, ML, 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 ML and big data applications on the platform. Other Selection Criteria include a strong delivery track record and the ability to provide quality talent and staff certified in Google Cloud, especially on fast-emergent practices and platforms like large language models (LLMs), prompt engineering and Gemini. Enterprises also look for providers to help develop new industry use cases, implement collaborative and productive hybrid work models and develop effective tools and systems to meet environmental, social and governance (ESG) goals.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following five quadrants for services/ solutions: 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 (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' 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 providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the 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 providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between$20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

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

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptionsare 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 Section

This report is relevant to enterprises across industries in Europe for evaluating providers offering Google Cloud 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 these providers in Europe and how they address the critical challenges in the region. This assessment is based on the depth and breadth of providers' service offerings and market presence.

As European enterprises embrace the digital transformation journey, the imperative for integrating and implementing Google Cloud services becomes increasingly evident. Challenges such as legacy system integration, data migration and compliance with stringent regional regulations such as GDPR underscore the importance of partnering with providers that offer tailored services. These services address European enterprises' unique needs and objectives, ensuring the seamless deployment of cloud-native solutions and sustainable cloud migrations, enabling organizations to remain competitive in today's dynamic business landscape. Enterprises in this region are also seeking providers to assist in adopting Gemini, Google Cloud's most capable and flexible AI model, to revolutionize business operations with its advanced reasoning capabilities.

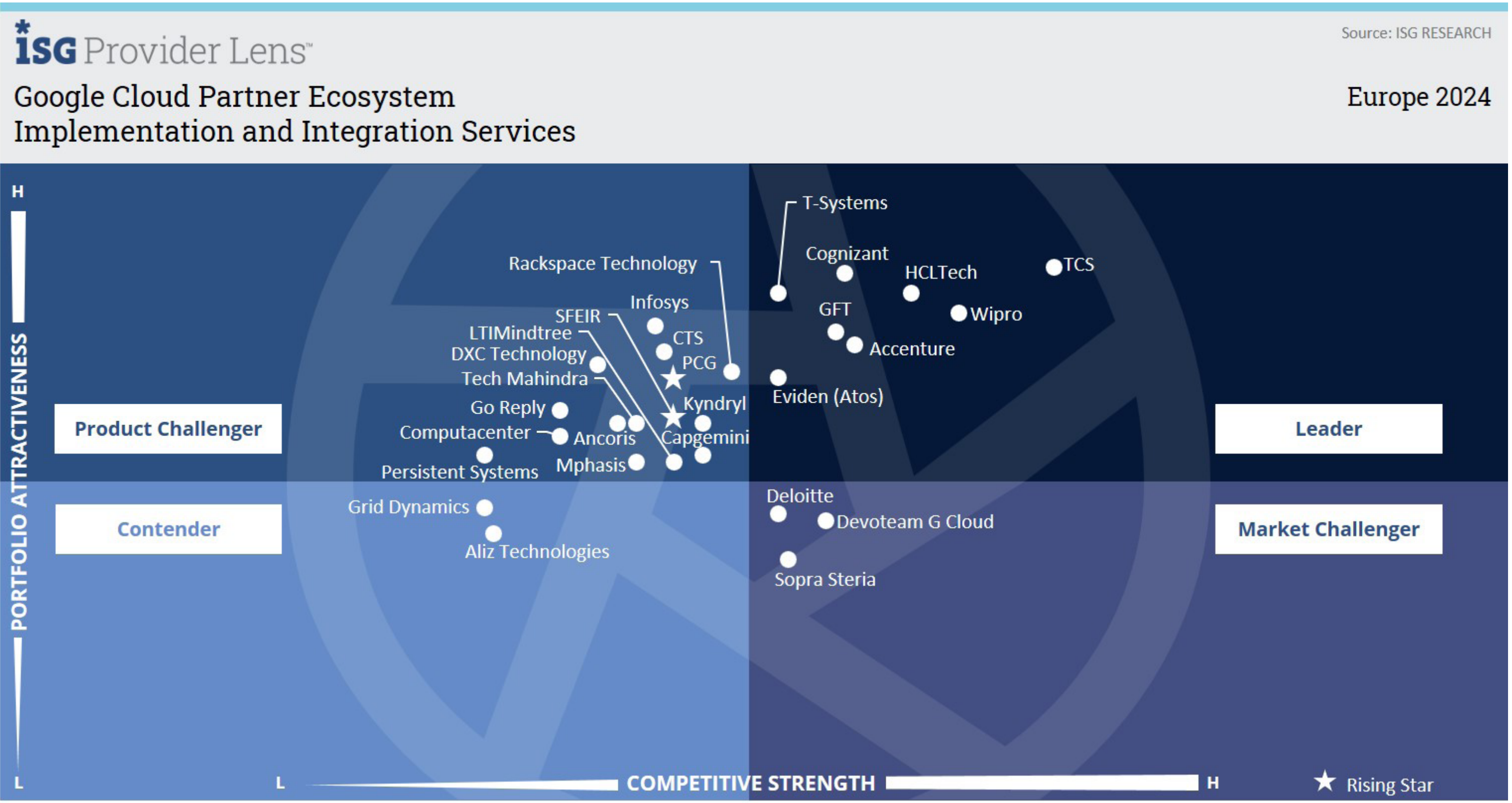
Enterprises in this region are committed to implementing security best practices across every stage of the integration lifecycle, from initial design to continuous monitoring and maintenance. They seek engagement with providers offering comprehensive, risk-based cloud security assessments for infrastructure and workloads, ensuring end-to-end protection of their business on Google Cloud.

Technology professionals should read this report to understand providers' relative positioning and capabilities for effectively utilizing Google Cloud's implementation and integration services.

Digital professionals should read this report to learn about Google Cloud implementation and integration service providers' positioning and how they can impact clients' ongoing transformation initiatives.

Procurement professionals should read this report to understand the capabilities of providers offering Google Cloud implementation and integration services in Europe and gain a competitive edge.

Cybersecurity professionals should read this report to learn how providers address significant compliance and security challenges while maintaining a seamless enterprise experience.



This quadrant assesses providers offering implementation and integration services for Google Cloud. Providers are developing specialized **industry clouds** for Google Cloud and crafting solutions to optimize **energy usage** and **carbon impacts.**

Mark Purdy

Definition

This quadrant assesses GSIs and IT providers that offer migration, implementation, modernization and integration services for data workloads and applications on Google Cloud. 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 ML 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 ML, 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 interfaces (APIs),** automation, data science, AI and ML
8. Experience in measuring and optimizing **cloud-related carbon emissions** on Google Cloud

Observations

The ecosystem for Google Cloud implementation and integration services continues to mature and evolve in the complexity and specialization of provider offerings. All leading providers offer an extensive range of services for Google Cloud, spanning advisory, cloud migration, cloud-native transformation, multicloud services using Anthos, application development and Apigee services for API management. ISG observes several distinct trends in this space. First, many providers emphasize their sustainability credentials on Google Cloud. They do this in several ways, such as optimizing Google Cloud's native features to reduce energy consumption and carbon emissions (for example, through region selection); implementing green coding or software frameworks; integrating sustainability metrics into FinOps reporting on Google Cloud; or incorporating elements of user design into cloud implementations and migration to reduce carbon impacts. Second, many providers now offer industry-specific solutions for Google Cloud, which are often precision-cut to meet specific industry requirements, such as capital adequacy reporting regulations in banking or CX measures in retail or consumer goods. Thirdly, data sovereignty issues and regulations remain a concern for many enterprises transitioning to the cloud in Europe, prompting providers to increasingly integrate elements of sovereign data control into their cloud services offerings.

From nearly 43 companies assessed for this study, 28 qualified for this quadrant, with eight being Leaders and two Rising Stars.

Accenture, a seasoned provider of cloud-native implementations and migrations on Google Cloud, has significant expertise and offerings in relation to next-generation application development.

Cognizant offers a broad set of implementation and migration services for Google Cloud, with significant investment in accelerators for infrastructure, application development and IoT applications.

Eviden (an Atos Business) offers various implementation models for enterprises moving to Google Cloud, with a focus on complementary FinOps and sustainability reporting solutions.

GFT emphasizes its cloud accelerators in its offering for implementation and integration services in Europe, particularly in data, BFSI and multicloud implementations via Google Anthos.

HCLTech continues to invest in a well-structured framework for industry cloud networks on Google Cloud. It has also established three Google Cloud Innovation Labs, of which one is located in London.

TCS offers services carefully calibrated to clients' cloud maturity and lifecycle stages. It has invested in an extensive set of industry-inflected solutions for Google Cloud.

T-Systems has issued the third release of its Sovereign Controls Powered by Google Cloud solution, enhancing capabilities for managing regulated and non-regulated workloads within organizations (DNS, etc.).

Wipro has invested significantly in ramping up its certifications on Google Cloud, gaining traction with leading multinational enterprises in Europe for its IIS services on Google Cloud.

PCG (Rising Star) offers an extensive set of implementation and integration services on Google Cloud. It has a large cohort of Google specialists and significant client traction in the DACH region especially.

SFEIR

SFEIR (Rising Star) has extensive experience in enterprise training for Google Cloud infrastructure. It offers an impressive set of accelerators across the Google Cloud technology set.

GFT

Leader

"GFT's significant investment in a range of cloud accelerators and its track record of innovation make GFT a Leader in Implementation and Integration Services for Google Cloud."

Mark Purdy

Overview

GFT is headquartered in Stuttgart, Germany. It has more than 12,000 employees across 46 offices in 20 countries. In FY23 the company generated €789 million in revenue, with Banking as its largest segment. GFT is a Premier Google Partner and has two Specializations on Google Cloud: Infrastructure – Services and Application Development – Services. With delivery units in Poland and Spain, the company has a substantial client footprint for its integration and implementation services on Google Cloud in Europe, supported by a large team of Google Cloud professionals in the region.

Strengths

Cloud accelerators: GFT has developed an impressive set of cloud accelerators, focusing on data modernization. It is also building a BFSI-specific accelerator to accommodate specific regulations faced by the banking sector, such as Basel III Foundational and Advanced RB Capital Accuracy and ESG Impacted Structured Products Cashflow Accuracy.

Cloud innovation: GFT has a significant track record of innovation atop Google Cloud. Specific examples include serving as a test partner for innovations around Google GKE Enterprise (e.g. GKE on VMware, GKE on Azure, GKE Attached Cluster, and GKE Multi-tenant) and the development of a Smart Factory solution using Google Cloud to help manufacturers monitor factory operations.

Green coding: GFT emphasizes the delivery of sustainability outcomes on Google Cloud through its Green Coding initiative. The program equips GFT consultants with the skills, tools and frameworks to integrate energy usage and carbon optimization considerations at every stage of a cloud implementation and migration project. It also includes training in aspects of UX design that can affect the energy usage and carbon footprint of cloud implementations. GFT has also developed thought leadership exploring the role of GenAI in helping enterprises meet their sustainability goals.

Caution

GFT should showcase more European case studies and client credentials for its integration and implementation services on Google Cloud in Europe. It should explore introducing more outcome-based and gainshare elements into its overall pricing mix.

Data Analytics and Machine Learning

Who Should Read This Section

This report is relevant to enterprises across industries in Europe for evaluating data analytics and ML service providers. In this quadrant, ISG highlights the current market positioning of such providers in Europe and how they can address the key challenges enterprises face.

The European market for data analytics and AI is experiencing significant growth, driven by the need for businesses to be agile, resilient and data driven. Enterprises across Europe seek robust tools capable of extracting actionable insights from vast datasets, driving the adoption of AI and ML technologies. Google Cloud's proficiency in data analytics and ML positions it as a leading choice for European enterprises aiming to capitalize on this trend. European enterprises are increasingly counting on Google Cloud's data analytics tools, such as BigQuery, to liberate relevant data from departmental silos, combine it with external data sources and deliver the resulting insights in a meaningful format to decision-makers.

These enterprises prioritize leveraging Google Cloud services to automate processes, optimize workloads and unlock the full potential of their data through advanced analytics tools.

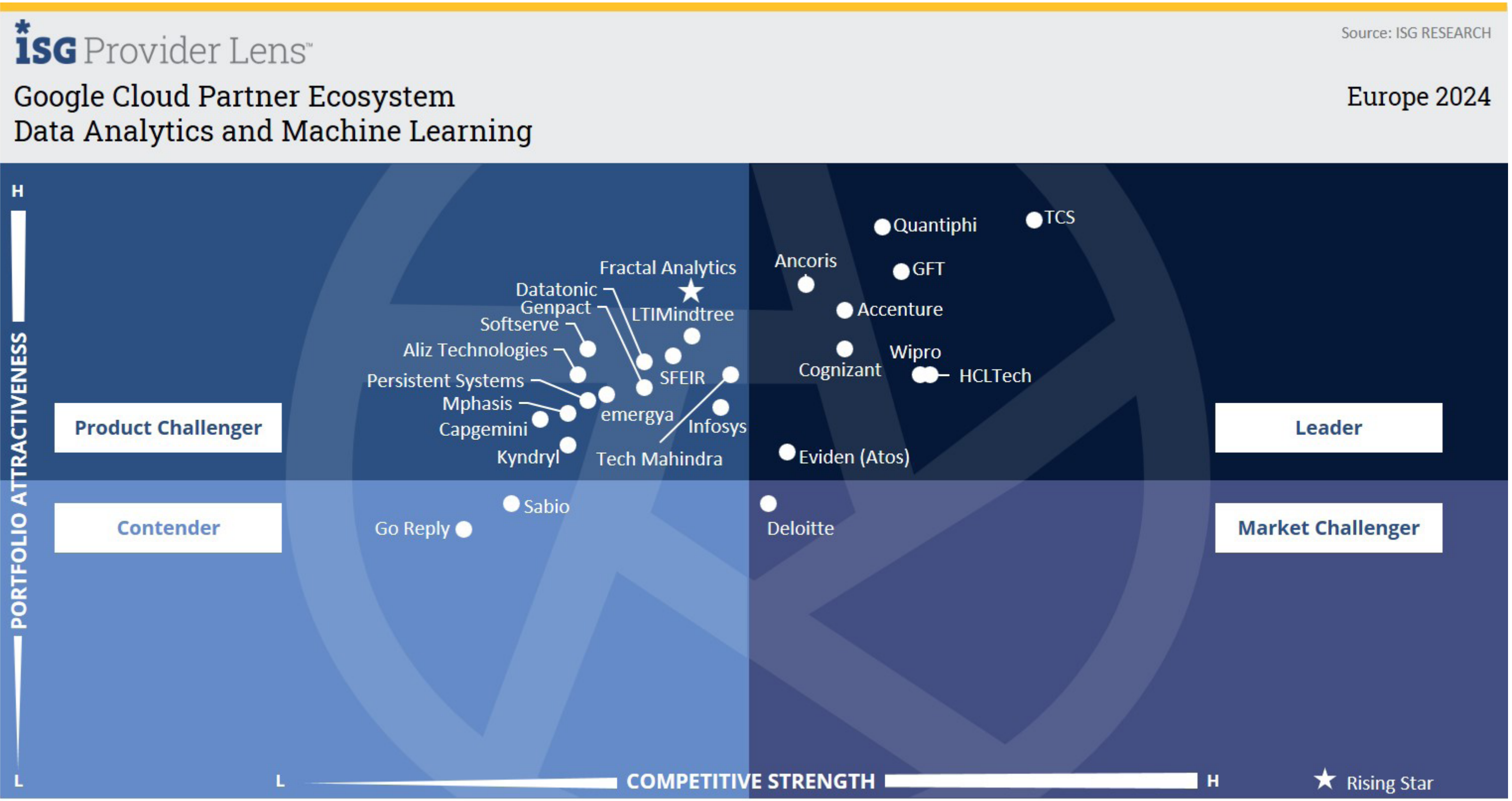
Moreover, given the region's stringent data privacy regulations, such as GDPR, European enterprises prioritize providers committed to rigorous data security and compliance standards. European enterprises are at the forefront of innovation by leveraging Google Cloud's suite of industry-leading tools. This powerful combination of Google Cloud-native solutions, including BigQuery, Vertex AI, Bard (for generative AI) and TensorFlow, empowers them to unlock a new era of data-driven decision-making and AI implementation.

Technology professionals should read this report to understand providers' relative positioning and capabilities in utilizing Google Cloud data analytics and ML and how they are compared in the market.

Digital professionals should read this report to know the positioning of Google Cloud data analytics and ML service providers and how they can impact enterprises' ongoing transformation.

Procurement professionals should read this report to learn about Google Cloud data analytics and ML service providers in Europe and understand the competitive edge offered by each provider.

Cybersecurity professionals should read this report to learn how providers address significant compliance and security challenges while maintaining a seamless enterprise experience.



Data analytics and machine learning service providers help enterprises with **data modernization strategies, tools and frameworks.** They also increasingly **co-innovate** with enterprises to take **GenAI use cases** from **proof of concept to production.**

Mark Purdy

Definition

This quadrant assesses providers that showcase strongly differentiated capabilities in leveraging big data technologies and ML, especially in bleeding-edge deep learning algorithms and API libraries available and accessible through Google Cloud. 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 Google Cloud at scale. These capabilities can include using CloudSQL, Cloud Dataproc, BigQuery, Cloud Datalab and Datastore, and running and developing solutions/services on the migrated workloads from MySQL, Hadoop, Spark and Hive on Google Cloud, LLMs, transformers and autoencoders, Programming by Example (PBE) and Few-Shot Learning (FSL) algorithms. Providers are also participating in Google-certified talent upskilling programs on GenAI, LLM and prompt engineering.

Capabilities around new data architectures, such as data meshes, are becoming crucial as organizations are moving away from legacy data warehouses and data lakes. Aligning with industry-leading innovations in the tech landscape, such as DALL·E 3, GPT-4 and the recent advancements in Google Gemini, Leaders in this quadrant are expected to develop a wide range of industry and point solutions using Google Cloud's data analytics and machine learning features. Some of these solutions include use cases for computer vision and 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. Staff availability, experience and certifications and competencies in the Google Cloud **DAML**-related tech stacks
5. **Availability of Google Cloud-focused offerings, roadmaps** and **innovations** (current and planned)
6. Number and reputation of case studies and client examples about **DAML services and solutions** on Google Cloud
7. A point of view around recent developments in ML, such as **LLMs, multimodal GenAI use case development and prompt engineering skills**
8. Strong focus and expertise in a broad range of Google Cloud'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

Observations

The Data Analytics and Machine Learning quadrant represents the most dynamic, innovative and competitive part of the Google ecosystem. Nearly all leaders offer extensive services, spanning advisory, consulting, data modernization, AI and ML development and data security. As expected, GenAI features prominently in the solutions and services on offer. However, Leaders highlight the less exciting but likely more important task of enterprise data modernization, showcasing an array of data migration tools and data governance, security and management frameworks to help clients unlock siloed or stranded data sources within their organization. Leaders also seek to help clients penetrate the GenAI hype through structured, methodical approaches to identifying successful business use cases. Providers do this in different ways: some emphasize rapid prototyping to see what works (or fails) quickly; others offer multiphase workshops or co-innovation lab sessions to winnow down ideas into prototypes, POCs and then finally into production.

From nearly 43 companies assessed for this study, 26 qualified for this quadrant, with nine being Leaders and one a Rising Star.

Accenture offers a broad sweep of data modernization services for Google Cloud, along with several industry-specific and functional data platforms, to help organizations make the most of their enterprise data.

Ancoris

Ancoris has made significant investments in GenAI capabilities and assets as it seeks to pivot to an AI-native company. It has earned some significant new client wins in the data analytics and machine learning space and has driven new work with existing clients.

Cognizant has invested significantly in developing a wide set of verticalized GenAI solutions for Google Cloud. It has also infused GenAI features into Neuro®AI, its overall framework for enterprise AI adoption.

Eviden (an Atos Business) offers significant expertise in data analytics using Google Cloud technologies through its Maven Waven team. It offers a four-phased approach to GenAI designed to take use cases from conception to POC to production.

GFT offers a variety of GenAI use cases, methodologies and accelerators through its AI Data Analytic (AI.DA) Marketplace. It also has a data science team based in Cambridge, U.K., and centers of excellence in Poland and Spain.

HCLTech has a large talent base for its data analytics and machine learning services on Google Cloud. It has recently opened three Google Cloud Innovation Labs, including one in London.

Quantiphi offers an extensive set of data analytics and machine learning services in Europe. It has achieved significant success working with clients to identify GenAI use cases and move these successfully into production and business impact.

TCS offers a comprehensive set of data analytics and machine learning services for Google Cloud in Europe. It has invested significantly in GenAI tools, solutions and studios.

Wipro, in May 2023, announced a GenAI partnership with Google Cloud to co-innovate industry and functional GenAI solutions for clients. Wipro and Google specialists will also work side by side as part of a new Google Resident Engineer program.

Fractal Analytics

Fractal Analytics (Rising Star) has developed a range of powerful data platforms in areas such as data harmonization, customer genomics and business experimentation.

GFT

Leader

"With its focus on use-case commercialization through its AI.DA Marketplace and expertise in large language model applications, GFT is a Leader in Data Analytics and Machine Learning on Google Cloud."

Mark Purdy

Overview

GFT is headquartered in Stuttgart, Germany. It has more than 12,000 employees across 46 offices in 20 countries. In FY23, the company generated €789 million in revenue, with Banking as its largest segment. GFT is a Premier Google Partner and has two Specializations on Google Cloud: Infrastructure – Services and Application Development – Services. It also has delivery units in Poland and Spain. The company has a substantial client base for its data analytics and machine learning services on Google Cloud in Europe, alongside a large cohort of Google Cloud-certified professionals and data engineers in the region. GFT also operates a data science center in Cambridge, U.K., and CoEs in Spain and Poland.

Strengths

AI orchestration: To help enterprises get started strategically on their GenAI journey, GFT has established its AI Data Analytics (AI.DA) Marketplace. This platform is designed for sharing best practices, use cases, blueprints and accelerators for GenAI. Most of these tools and frameworks are based on Google Cloud and its associated data analytics and machine learning solutions. The emphasis is on taking use cases from development to production-ready solutions. GFT has used the AI.DA Marketplace to help financial services customers develop GenAI-powered voice analytics for fraud detection. It has also harnessed the marketplace to help enterprises sustain their ML models through an MLOps offering.

Dual LLM approach: GFT is notable for its use of dual LLMs in creating solutions such as virtual assistants for enterprises. A decoder LLM is used to identify customer intents, predict query categories and identify APIs to call for additional information. A trusted encoder LLM is then used to retrieve data from enterprise systems and formulate a response targeted to the customer's data and circumstances. The dual LLM approach helps to improve the overall accuracy of digital assistants while preserving the security and privacy of customer data.

Caution

GFT's pricing for its data analytics and machine learning services is mainly based on fixed price or time and materials. It should consider more outcome-based or risk-sharing pricing models. The company should also consider acquiring specific Google Cloud Specializations in the data analytics and machine learning space.

Managed Services

Who Should Read This Section

This report is relevant to enterprises across industries in Europe for evaluating providers of Google Cloud managed services.

In this quadrant, ISG highlights the current market positioning of these providers in Europe and how they address the critical challenges associated with offering managed services in the Google Cloud ecosystem.

In the fast-paced landscape of enterprise IT, the push for accelerated operations is driving a significant surge toward the public cloud. However, amid this rush, European enterprises encounter a formidable challenge in ensuring that their cloud migration efforts are not only swift but also cost-effective and efficient. Without proper oversight, this rapid adoption can lead to overprovisioning, inefficient spending and subpar service delivery, hindering the achievement of desired outcomes.

To address these challenges, managed services for Google Cloud are gaining remarkable popularity among enterprises in Europe, providing expert guidance and support throughout the cloud journey. Enterprises in Europe want to focus on core business activities and innovation initiatives and seek engagement with MSPs equipped with a dedicated team of professionals monitoring and managing system software, infrastructure configurations and service consumption to achieve consistent and reliable performance while minimizing downtime and disruptions.

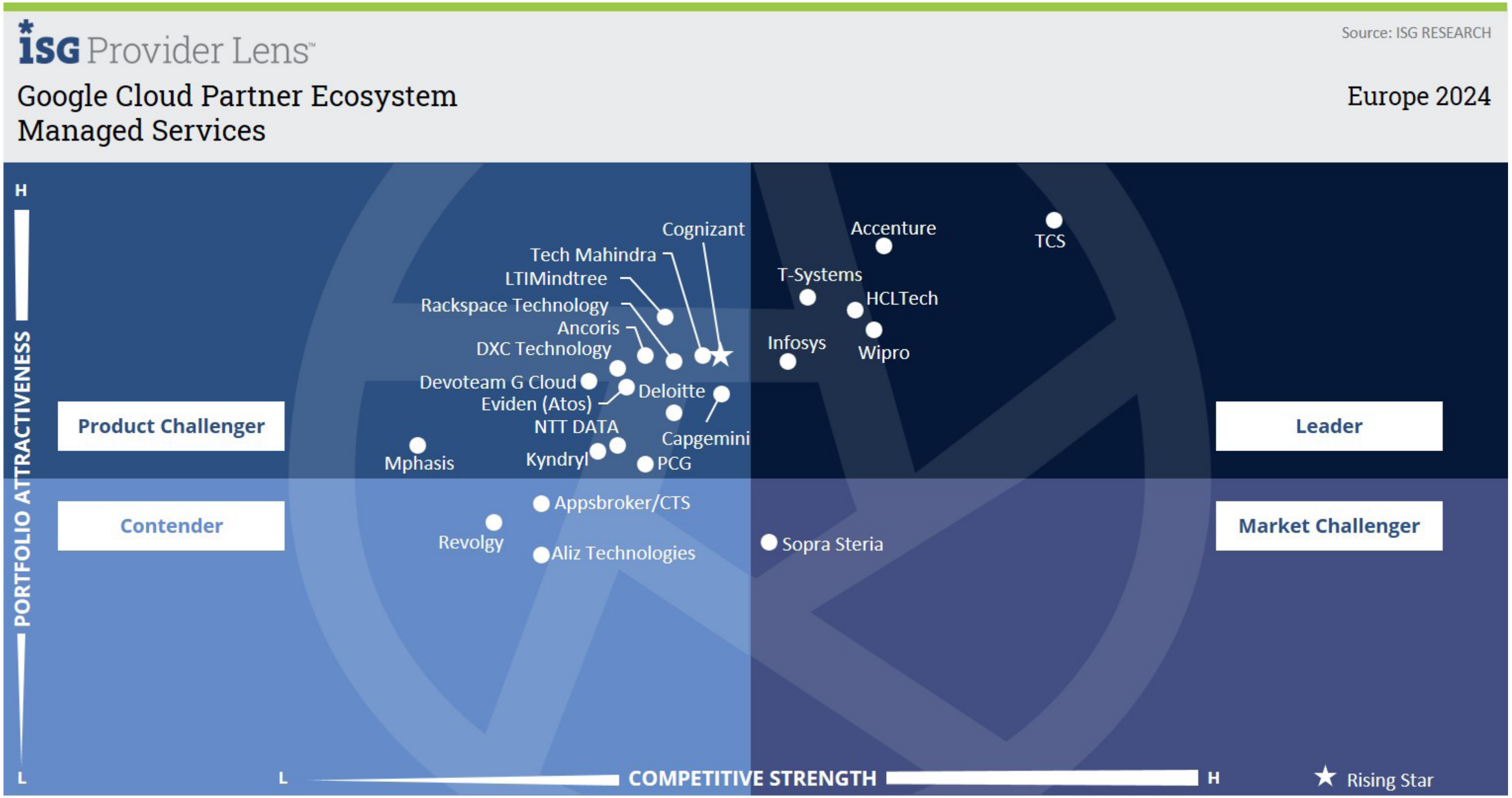
Enterprises in Europe prioritize FinOps practices to effectively manage cloud costs, aligning spending with business goals and implementing cost-saving measures. They seek providers to assist in managing Anthos effectively and leveraging observability practices, including FinOps, to optimize performance and cost-efficiency in cloud operations.

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

Digital professionals should refer to this report to understand the positioning of MSPs for Google Cloud and their potential impact on ongoing business transformations.

Procurement professionals should read this report to learn about Google Cloud MSPs in Europe and understand the competitive edge offered by each provider.

Cybersecurity professionals should read this report to learn how providers address significant compliance and security challenges while maintaining a seamless enterprise experience.



This quadrant assesses service providers that offer managed services for Google Cloud. Leaders emphasize **multicloud management tools** spanning Google Cloud and other hyperscalers, as well as **data sovereignty** and **FinOps** capabilities.

Mark Purdy

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 goals are 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 by using specially developed or licensed cloud management platforms (CMPs) and tools. SLAs for managed services normally encompass a wide range of services to drive business value, such as data management and governance, ML capabilities, and ESG and sustainability tools and assets.

Managed service providers also have teams well versed in Google Cloud-native skills such as cloud-native operations, site reliability engineering (SRE) and platform reliability engineering (PRE), as well as integrated practices like DataOps, ModelOps, MLOps, AIOps, and CloudFinOps. The maturity of managed services offerings for Google Cloud can also include the usage and impact of innovative intellectual property, including 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.

Eligibility Criteria

1. **Experience in designing, building and managing public and multicloud environments** with a focus on Google Cloud
2. **Supporting the development of software code, cloud-native architectures** and legacy systems integration
3. **Experience in implementing both Agile and DevOps** and integrating with clients' existing processes
4. **Experience in API automation, cloud analytics,** CloudOps, DataOps, ModelOps, LLMOps and related disciplines
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

Observations

In recent years, there has been a significant increase in the adoption of multicloud and hybrid cloud topologies across Europe. This trend is primarily driven by the need for greater flexibility, scalability and cost optimization in managing diverse cloud environments. As a result, there is a growing demand for multicloud management tools to simplify the complexities of managing multiple cloud platforms. One tool gaining traction in the European market is Google Anthos, which provides a consistent management layer across different cloud environments, including public, private and edge clouds. Leading providers have showcased strong expertise in multicloud management tools and offer comprehensive support for implementing and managing Anthos-based solutions. Another trend observed by ISG is the focus on data sovereignty. With growing concerns around data residency, MSPs are focusing on offering solutions that ensure client data remains within the European Union, addressing data localization requirements. Leading providers emphasize Google's partnership to enhance their capabilities further and deliver tailored sovereign cloud solutions that balance control and innovation.

ISG also observes that concerns around cost optimization and maximizing cloud ROI are still prevalent in this region, intensifying demand for managed FinOps. Many MSPs are actively focusing on partnerships with cloud providers such as Google Cloud to offer tailored FinOps solutions leveraging the provider's tools and expertise. These providers deploy automated tools to identify cost anomalies, recommend cost-saving measures and automate cloud resource provisioning and scaling.

From nearly 43 companies assessed for this study, 24 qualified for this quadrant, with six being Leaders and one a Rising Star.

Accenture leads in modernizing security positions through strategic collaboration with Google Cloud, integrating advanced technology and leading expertise to defend against sophisticated cyber threats.

HCLTech's investment in a large and qualified Google Cloud workforce positions it well to deliver Google Cloud managed services. Its focus on continuous learning ensures that its talent stays ahead of the curve to execute projects with precision.

Infosys, with AI-driven automation and an "Everything as Code" approach, prioritizes repeatability and optimization for seamless cloud management and enhanced client collaboration.

T-Systems' Sovereign Cloud powered by Google Cloud, in addition to managed services for Google Cloud, marks a significant advancement, extending cloud benefits to critical industries such as manufacturing, healthcare and the public sector in the DACH region.

TCS, leveraging its leadership as a Google Cloud Premier Partner and MSP, has further enhanced its CloudOps abilities by integrating its TCS Cloud Exponence platform with Anthos to deliver comprehensive CloudOps services across multicloud and hybrid cloud environments.

Wipro's strengths lie in its technical expertise, encompassing a rich catalog of Google-based intellectual properties, its ability to scale globally in collaboration with Google and its deep-rooted client relationships across embedded accounts.

Cognizant's (Rising Star) strength lies in the breadth and depth of its managed services portfolio tailored specifically for Google Cloud clients. Within its Hybrid Cloud and Cloud Shared Services offerings, Cognizant provides a wide range of solutions to address diverse needs.

SAP Workloads

Who Should Read This Section

This report is relevant to enterprises across industries in Europe for evaluating providers offering services related to Google Cloud SAP workloads. In this quadrant, ISG highlights the current market positioning of such providers in Europe and how they address enterprises' critical challenges.

European enterprises are accelerating their digital transformation by moving SAP workloads to Google Cloud. This shift is driven by the desire for agility, access to advanced cloud capabilities (AI, ML and analytics) and cost savings. These enterprises seek experienced Google Cloud and SAP partners who understand the European landscape and can guide a smooth migration by eliminating technical barriers. Enterprises in this region seek to reduce the total cost of ownership, migration costs and SAP project expenses. Enterprises in this region prefer providers capable of defining the right strategy and executing SAP workload migration to Google Cloud swiftly and precisely, resulting in significant cost savings.

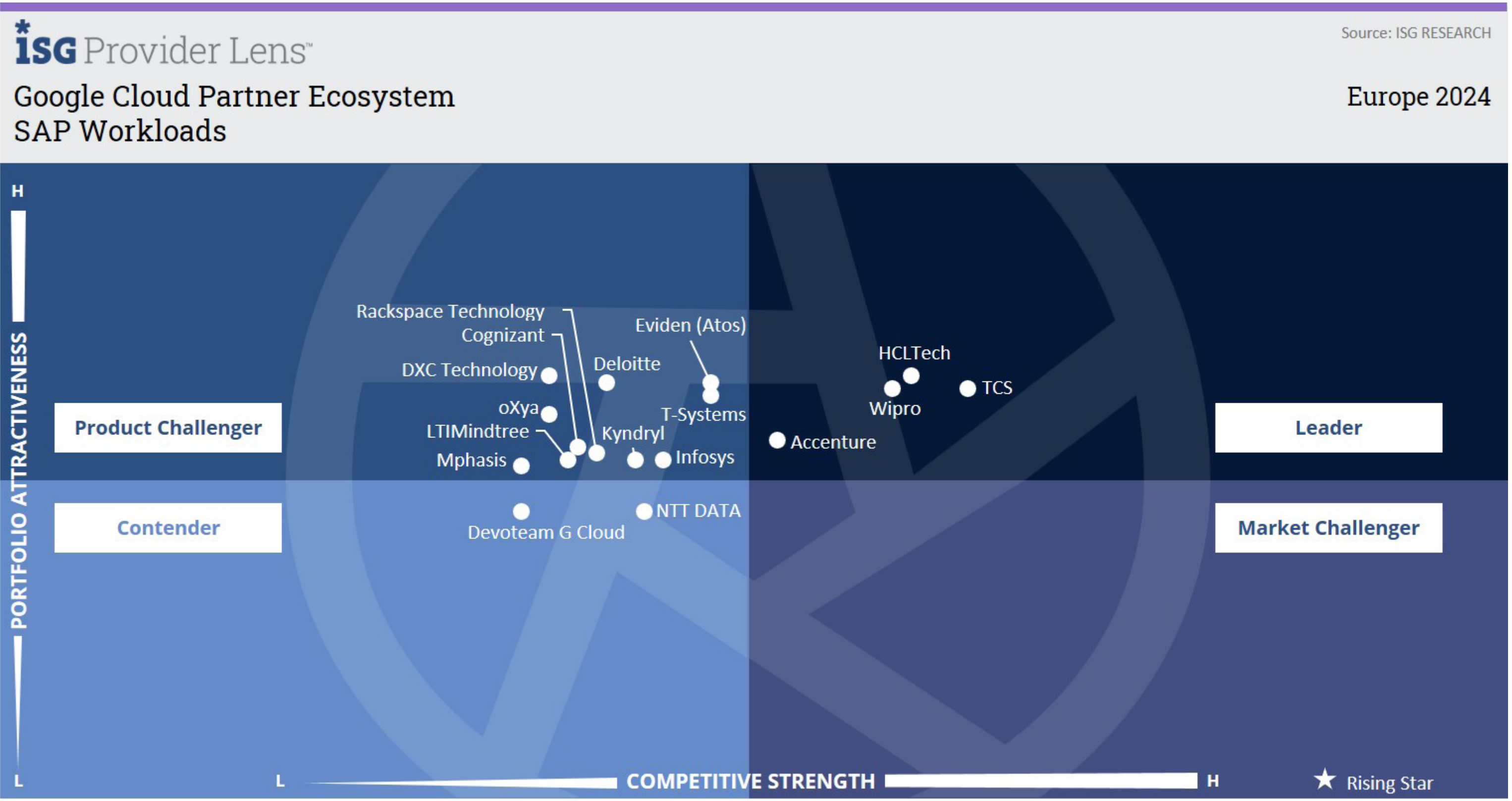
European enterprises are increasingly migrating data from SAP HANA to Google Cloud's BigQuery. This shift unlocks advanced analytics capabilities for their SAP data. BigQuery's scalability, cost-effectiveness and seamless integration with Google's analytics tools enable deeper insights and improved decision-making. Enterprises seek providers with specific expertise to effectively bridge the gap between these two systems and optimize the migration process. Security and risk mitigation are paramount considerations for enterprises in Europe that leverage BigQuery's powerful data analytics capabilities to confidently migrate their SAP workloads to Google Cloud.

Technology professionals should read this report to understand SAP on Google Cloud services provider landscape, compare their capabilities and fully harness it.

Finance professionals should read this report to understand the positioning of SAP providers in the Google Cloud ecosystem and how they can enhance their routine critical processes.

Procurement professionals should read this report to understand the capabilities of SAP on Google Cloud service providers positioning in Europe and the competitive edge they offer.

Cybersecurity professionals should read this report to learn how providers address significant compliance and security challenges while maintaining a seamless enterprise experience.



This quadrant assesses service providers that offer services for SAP workloads on Google Cloud. Leading providers typically emphasize **automation-powered accelerators,** as well as their ability to create **functional** and **industry-focused solutions.**

Mark Purdy

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. Through customer case studies and success storyboards, they should also demonstrate how they have helped clients run SAP and related enterprise technology stacks across different industries to leverage the Google Cloud ecosystem, for example, SAP HANA Enterprise Cloud, S/4HANA, SAP Ariba and others. The focus will be on how clients realize value from SAP on Google Cloud regarding higher cost efficiency, improved accuracy and speed of enterprise business processes running on the SAP tech ecosystem, and data and application security. The efficiencies clients achieve can also be demonstrated in resizing virtual machines and speeding the scaling of enterprise infrastructure elasticity and resilience.

Eligibility Criteria

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

Observations

Typically, Leaders in this quadrant are large providers that can handle the scale and complexity of SAP implementations in any hyperscaler cloud environment. However, relatively few have developed solutions or applications specifically for the Google Cloud environment; instead, their services are usually designed to work across different public clouds. Against that backdrop, ISG identifies several trends in the SAP workloads on Google Cloud space in Europe. First, there is growing demand for SAP RISE constructs on Google Cloud, alongside the more traditional cloud-native deployments. Second, Leaders emphasize their industry expertise and provide industry-specific solutions for SAP workloads across a spectrum of industries, including manufacturing, retail, fashion and defense. Additionally, providers offer a multitude of functional SAP solutions spanning areas like finance, HR and sourcing. Third, Leaders are inclined to highlight their sustainability-oriented solutions for SAP workloads, covering aspects such as carbon management and reporting, as well as advancing circular economy objectives.

Fourth, Leaders typically infuse a heavy dose of automation and AI and ML capabilities into their SAP accelerators, offering tools such as one-click migration.

From nearly 43 companies assessed for this study, 17 qualified for this quadrant, with four being Leaders.

Accenture is a seasoned practitioner of SAP implementation and integrations. It offers an extensive set of industry and functional solutions related to SAP technologies in general.

HCLTech has invested in several industry-inflected IP for SAP on Google Cloud. It has also recently expanded its Google Cloud delivery network to include locations in Romania and Poland.

TCS has developed an extensive set of service offerings for SAP workloads on Google Cloud, with an emphasis on AI-powered migration accelerators such as TCS SAP Cloudify.

Wipro offers an extensive set of services, tools and solutions for SAP on Google Cloud, with a notable emphasis on improving sustainability and FinOps outcomes for enterprises.

Workspace Services

Who Should Read This Section

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

In this quadrant, ISG highlights the current market positioning of these providers in Europe and how they address the critical challenges enterprises face in the region.

The evolving dynamics of the modern workplace present new challenges for enterprises across Europe amid uncertain economic landscapes. Both frontline and knowledge workers now demand access to appropriate tools and devices for effective task execution from any location. Consequently, European enterprises are focusing on establishing secure, flexible and scalable environments to empower their workforce and drive productivity and engagement. European enterprises are increasingly favoring Google Workspace due to its collaborative features. The platform's real-time co-editing features in Docs, Sheets, Slides and integrated video conferencing (Meet) are especially appealing for fostering teamwork among geographically dispersed teams.

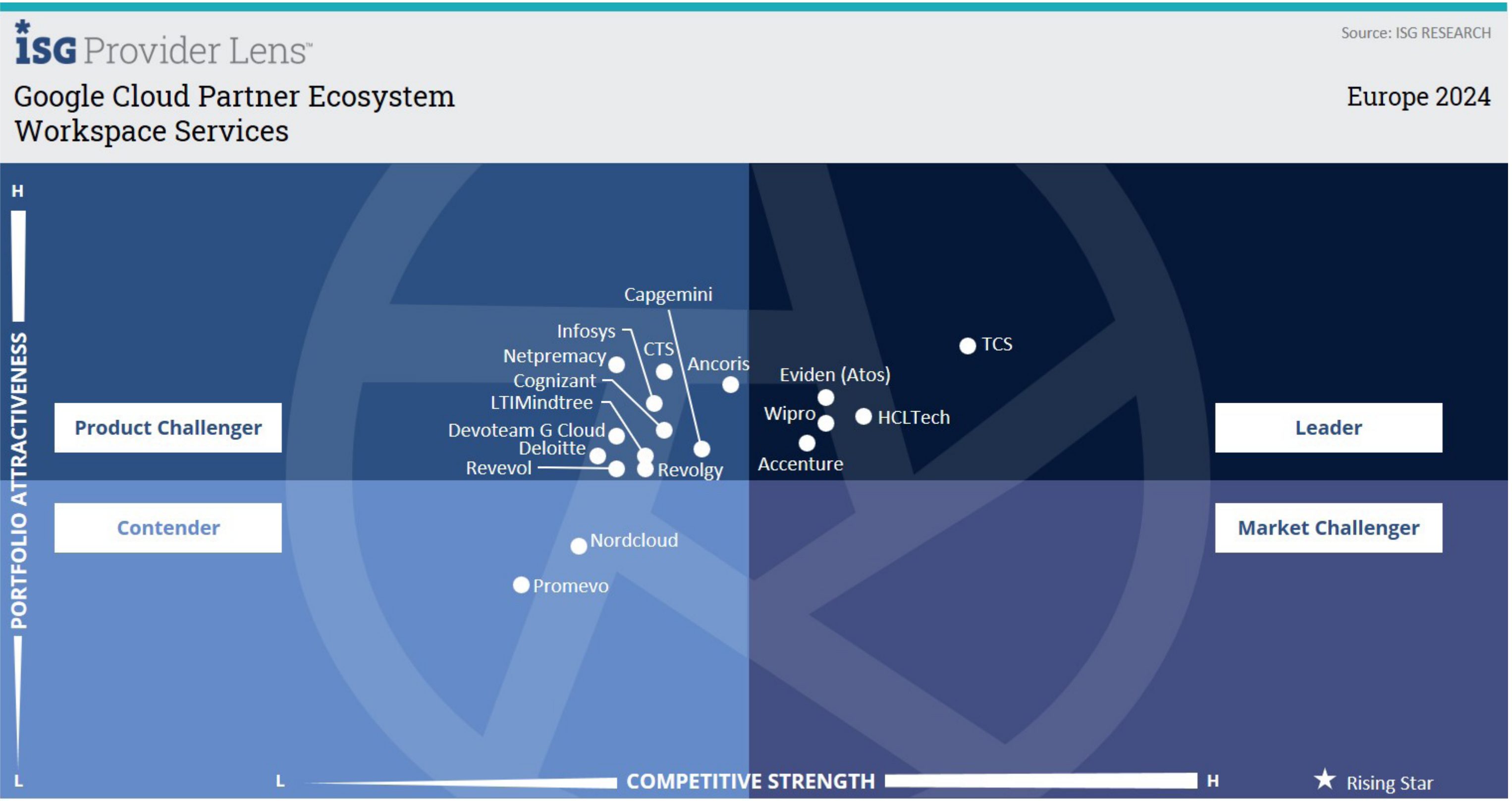
Transitioning to a hybrid work model with a new platform such as Google Workspace requires change management. Enterprises in this region seek providers capable of assisting in developing training programs, communication plans and user adoption strategies to facilitate a seamless transition for the workforce. To further enhance productivity and unlock creative potential within Google Workspace, European enterprises are increasingly leveraging advanced AI tools, such as Gemini, to streamline workflows, foster innovative thinking and optimize collaboration.

Technology professionals should read this report to understand providers' relative positioning and capabilities in offering Google Workspace services and how they are compared in the market.

Cybersecurity professionals should read this report to learn how providers address significant compliance and security challenges while maintaining a seamless enterprise experience.

Workspace professionals should read this report to identify the major Google Workspace service providers in Europe and understand what differentiates each of them.

Digital professionals should read this report to know the positioning of Google Workspace service providers and how they can impact firms' ongoing transformation.



This quadrant assesses providers that offer services for Google Workspace. Providers emphasize the use of **change management** expertise, experience in **UX design** and **user analytics tools** to spur the adoption and use of the platform.

Mark Purdy

Definition

This quadrant assesses GSIs and IT providers offering 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, 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, 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
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
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

Observations

The Workspace Services quadrant in Europe has plateaued somewhat over the last 12 months, with relatively few Leaders appearing in this space. This tapering of activity may reflect the dominance of rival workforce communication platforms or possibly changes in the incentives available to Google ecosystem providers. Nevertheless, ISG observes several distinct trends in the Workspace services ecosystem. First, as before, providers continue to offer a reasonably broad portfolio of services for Workspace, spanning advisory, greenfield implementations and legacy migrations, such as those from Lotus Notes. This year, we saw a significant emphasis by providers on SaaS or managed service-type modes of provision.

Second, providers recognize the challenges of workforce adoption and usage, with most of the Leaders offering change management services, persona profiling, user analytics tools and UX design services to help accelerate adoption. Third, GenAI is making an appearance in Google Workspace offerings, with providers offering services to enhance the adoption and native functionalities of Google's Gemini for AI (formerly Duet AI), its AI-powered work assistant. These services include the identification of use cases, measures to spur adoption and the development of appropriate governance frameworks. Finally, ISG also observes some providers addressing multiplatform integration, such as integrating Workspace features into a Microsoft Teams environment.

From nearly 43 companies assessed for this study, 18 qualified for this quadrant, with five being Leaders.

accenture

Accenture is a seasoned practitioner of implementations and integrations on Google Workspace. It has recently announced its acquisition of Udacity, an online learning and edtech company.

EVIDEN

Eviden (an Atos Business) offers a carefully curated set of services for Google Workspace, with a strong focus on UX design and workforce collaboration through its collaboration CoE.

HCLTech

HCLTech offers a wide range of implementation models for Google Workspace. It has invested significantly in various accelerators to help enterprises ease the transition to Workspace.

tcs TATA CONSULTANCY SERVICES

TCS has developed an extensive set of services for Google Workspace, with a healthy dose of generative AI solutions and a strong focus on integrating Workspace with other facets of the enterprise technology ecosystem.

wipro

Wipro provides administration, software maintenance and worker alignment services for Google Workspace through its Thrive offering, a subscription-based workforce service offering.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

Source: ISG Star of Excellence™ research program, Insights till July 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their **Google Cloud Partner Ecosystem** services.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Human Resources

▼ **Least satisfied**
Shared Services Operations

Region

▲ **Most satisfied**
North America

▼ **Least satisfied**
Middle East

Industry

▲ **Most satisfied**
Retail

▼ **Least satisfied**
Pharmaceuticals and life sciences

Industry Average CX Score

79.2

▲ Highest CX: 83.8
▼ Lowest CX: 51.4

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 384

Most Important CX Pillar

Execution and Delivery

Service Delivery Models	Avg % of Work Done
Onsite	55.1%
Nearshore	18.5%
Offshore	26.4%

Appendix

The ISG Provider Lens 2024 – Google Cloud Partner Ecosystem study analyzes the relevant software vendors/service providers in the European market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of June 2024 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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

The study was conducted in the following steps:

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

Lead Author

Mark Purdy

Lead Europe Analyst, ISG Provider Lens™

Mark Purdy is a Lead Analyst for Europe at ISG Provider Lens™ and brings more than 28 years of experience working on economics and technology research in business and government. Mark has a particular focus on next-generation technologies, especially artificial intelligence and intelligent automation, digital twins, digital olfaction, machine learning, virtual reality and edge computing.

Before joining ISG, Mark was chief economist at a major consulting firm for 20 years, leading work on the economic impact of AI and business futures, amongst other topics. Before that, he was an economic adviser at the U.K. Competition Commission, the Consumers' Association (where he focused on telecoms regulation and competition policy) and Ireland's National Economic and Social Council. He has published widely in tier-1 media and business publications such as Harvard Business Review and Sloan Management Review on subjects such as the metaverse, digital twins, emotional AI, digital olfaction, the social impact of AI and techno-nationalism. He speaks on economics and technology issues at conferences, client workshops and seminars worldwide.

Co Author and Global Overview Analyst

Sonam Vijay Chawla

Research Analyst

Sonam Chawla is a lead analyst at ISG where she co-authors and supports Provider Lens™ studies on Microsoft Partner Ecosystem, Google Ecosystem and Future of Work – Services and Solutions. Sonam comes with more than six years of experience in the market research industry and is skilled in secondary research, report writing, blog writing and company profiling. Her areas of expertise include hyperscalers, digital workplaces, enterprise collaboration, employee experience services, and conversational AI. She supports lead analysts in the research process and authors Enterprise Context and the Global Summary reports, highlighting regional as well as global market trends and insights. She also handles custom engagement requests from providers and advisors. Prior to this role, she worked as a research analyst, where she was responsible for authoring syndicated research reports and consulting on research projects.

Study Sponsor

Aman Munglani

Director: Hyperscalers,
Digital Innovator Series and Custom Research

Aman Munglani leads the ecosystems and custom research practice for ISG. He brings over twenty years of expertise in emerging technologies and industry trends. His career is marked by significant contributions in guiding top executives from Global 2000 companies, offering strategic advice on digital transformation, start-up partnerships, driving innovation, and shaping technology strategies.

In his tenure exceeding twelve years at Gartner, Aman focused on providing CIOs and IT executives across Asia Pacific and Europe with insights on the practical implementation and advancement of new technologies, the evolution of infrastructure, and detailed vendor assessments.

IPL Product Owner

Jan Erik Aase

Partner and Global Head – ISG Provider Lens/ISG Research

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 partner 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™

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

JUNE, 2024

REPORT: GOOGLE CLOUD PARTNER ECOSYSTEM