

Google Cloud Partner Ecosystem

A research report comparing strengths and advantages of Google Cloud partners



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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 general 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.



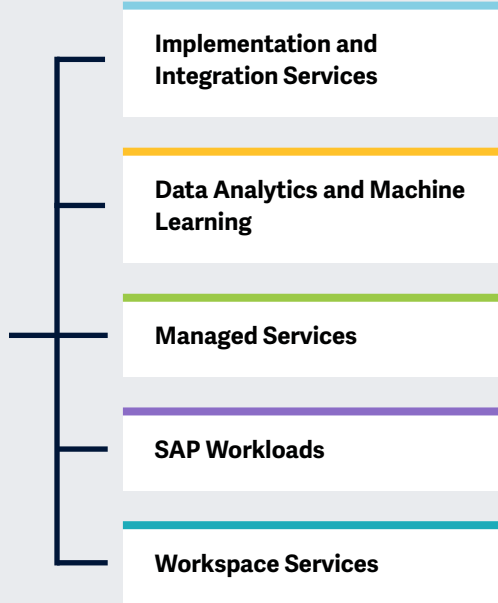
Google Ecosystem – 2024: Deep View

Quadrants	Areas Covered										Cornerstones					
Implementation and Integration Services	Architecture (Design and Build)					Migration and Multicloud Integration (Deployment Methodology – Anthos)				Modernization (Governance)		Innovation (IP – Accelerators)	Partnerships (Tiers – Types)	Competency and Talent (Resources – Certifications)	Industry Focus and Alignment	Experience and Engagement
	Compute – Storage – Network Integrated Architecture	Cloud – Data – AI	Sandboxed	Applications	Data Workloads	ML	GenAI									
Managed Services	Cloud Operations (Run)					Performance			Optimize							
	Orchestration	Observability	FinOps	DataOps – ModelOps – LLMOps	Availability	IaaS	PaaS	GRC	ESG	SRE and PRE						
SAP Workloads	SAP Operations			Industry Focus SAP Expertise			Integrated D&A on SAP									
	Consulting and Implementation	Integration	S/4HANA Migration	Industry Solutions	Tools and Accelerators	SAP Leonardo and Google AI		Deep Learning – Big Data								
Data Analytics and Machine Learning	GenAI with Google			Insights and Decision-Making				Customized ML Solutions								
	Responsible GenAI	Gemini LLM	GenAI Capabilities	Predictive ML, Analytics	Dashboards & Real-Time Insights	Hyperpersonalization		Industry-Specific Solutions	Enterprise LLM	Security and GRC						
Workspace Services	Workspace Suite (Lifecycle Management of Apps)			Customization/Personalization			Productivity									
	Deploy	Integrate	Manage	Stakeholder Experience	Collaboration Features	Easy Accessibility	Multichannel	Work From Anywhere (WFA)	Self-Service							



Key focus areas for the Google Cloud Ecosystem 2024 study.

Simplified Illustration Source: ISG 2024



The ISG Provider Lens™ Google Cloud Ecosystem 2024 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 APAC, Brazil, Europe and the U.S.
- APAC – this is a new region covering Asia Pacific, including ANZ, India and the ASEAN-6*, but excluding Japan, South Korea and China/Taiwan.

*ASEAN-6 = Indonesia, Malaysia, Philippines, Singapore, Thailand and Vietnam

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 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



Data Analytics and Machine Learning

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 DAML 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



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 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



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. 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



Workspace Services

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



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following five quadrants on Google Cloud Ecosystem Partners 2024:

Quadrant	APAC*	Brazil	Europe	U.S.
Implementation and Integration Services	✓	✓	✓	✓
Data Analytics and Machine Learning	✓	✓	✓	✓
Managed Services	✓	✓	✓	✓
SAP Workloads	✓	✓	✓	✓
Workspace Services	✓	✓	✓	✓

*ANZ, India and the ASEAN-6 – excluding Japan, South Korea, China/Taiwan



The research phase falls in the period between January and February 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in June 2024.

Milestones	Beginning	End
Survey Launch	January 23, 2024	
Survey Phase	January 23, 2024	February 23, 2024
Sneak Previews	May 2024	
Press Release & Publication	June 2024	

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2024 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.

Here is the email address:
ISG.star@isg-one.com

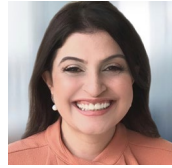


Contacts For This Study



Ashwin
Gaidhani

Lead Analyst,
APAC



Adriana
Frantz

Lead Analyst,
Brazil



Mark
Purdy

Lead Analyst,
Europe



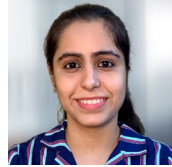
Tapati
Bandopadhyay

Lead Analyst,
U.S.



Tanya
Varshney

Research Analyst,
APAC and Europe



Sonam Vijay
Chawla

Research Analyst,
APAC and Europe



Plinio
Leme

Research Analyst,
Brazil



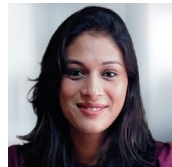
Sameen M
Siddique

Research Analyst,
U.S.



Anuj
Sharma

Data
Analyst



Monika
Kathuria

Senior Project
Manager



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 advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures 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 QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT 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



Troy
Williams

Partner, APAC



Susanta
Dey

Partner, Europe



Anay
Nawathe

Partner, U.S.



Aman
Munglani

**Director and
Principal Analyst**



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.

* Rated in previous iteration

66Degrees*	Bedu.tech	Cloudfresh	Devoteam G Cloud*
Accenture*	Birlasoft	CLOUDPILOTS	DoIT*
adesso	BIX Tech	Cloudwurdig	DP6
ADTsyst	BlueShift	Cognizant*	DXC Technology*
Alest	BRQ*	Compass UOL*	Embratel
Aliz*	Builders	Computacenter*	Emergya*
Ancoris*	Cancom	Compwire	Endava
Appsbroker*	Capgemini*	Conecta Nuvem	Engineering*
Artefact	CDW	Crayon	EPAM
Arvato Systems	Certsyst	CTS*	Equinix
Atos*	CI&T*	Datametica Solutions	ESX
Atra Informatica	Cirion Technologies	Dataside	Eviden*
Avenue Code	Claranet	Datatomic	Extreme Digital Solutions
AX4B	Cloud Kinetics	Deal	Extreme Group*
b.telligent	Cloud4C*	Deloitte*	Falconi



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* Rated in previous iteration

FCamara	Hexaware	Kasna*	NCS Group
FOTC	Huware srl	Knowit	Netpremacy*
Fractal Analytics	Hvar Consulting*	KPMG	Niteo
Fusionex	IBM*	Kumulus	Niveus Solutions
GCore	Ilegra	Kyndryl*	Nordcloud*
Genpact*	Indicium	Leega	Noventiq
Gentrop*	Inetum	Logicalis	NTT Data
GFT*	Infinite Computer Solutions	LTIMindtree*	<i>Oi Soluções</i>
Globant*	Infogain	Magna Sistemas	Ollion
Go Reply*	Infosys*	Media.Monks	Orange Business
GoWizYou	Ingram Micro	Movate	OTG
Grid Dynamics*	Injenia SRL	Movti*	oXya*
G-workplace	intelia*	Mphasis*	PA Consulting
happtiq	IPNET*	Multiedro*	PCG
HCLTech*	ISH Tecnologia	Nagarro	Persistent Systems*



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* Rated in previous iteration

Pipernet	Safetec*	Sopra Steria*	uCloud
Pitang	SantoDigital*	SOTEC	Unisys*
Pluto7	Sauter*	Stefanini	V8.Tech*
Promevo*	Searce	TCS*	Valtech
PwC*	Seibert Media	Team Computers	Vanenburg
Pythian	SFEIR*	Tech Mahindra*	Venha Pra Nuvem
QI Network*	Shivaami	Techolution	Vexia
Quantiphi*	Sky.One*	Teltec	Wipro*
Rackspace Technology*	Slalom*	TeraSky	Woolpert Digital Innovations
Revevol*	Softserve*	Thoughtworks	World Wide Technology
Revolgy*	Softtek	Tietoenvy	Xebia
Riley*	SoftwareOne	Tigabytes	Xtremax Pte. Ltd.
RW3	Solvimm	Tiger Analytics	Zazmic
Sabio*	Sonata Software	TIVIT*	Zensar Technologies
SADA*	Sonda	T-Systems*	



ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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

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ISG

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

For more information, visit isg-one.com.





JANUARY, 2024

REPORT: GOOGLE CLOUD PARTNER ECOSYSTEM