

Google Cloud Partner Ecosystem

A research report comparing provider strengths,
challenges and competitive differentiators

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The Google ecosystem is becoming larger and more dynamic than ever before.

The Google Cloud ecosystem continues to grow in scale, scope and variety of technology services and solutions. As the smallest of the three main hyperscalers, Google Cloud has been in the shadow of the Azure and AWS public clouds and associated ecosystems for several years. No longer. Since the launch of our inaugural Google Cloud Ecosystem report in 2022, ISG has seen rapid growth in the Google ecosystem, with providers making significant co-investments with Google, ramping up skills and certifications, setting up dedicated Google Cloud business units, and driving more workloads and data migrations to the Google Cloud Platform (GCP). ISG's 2023 study, based on extensive provider briefings and detailed primary and secondary research, provides a comprehensive overview of the ecosystem, along with an analysis of strengths and development areas of individual providers

across five distinct quadrants: Implementation and Integration Services; Data Analytics and Machine Learning; Managed Services; SAP Workloads; and Workspace Services.

While the growing market heft of Google Cloud can be attributed to many factors, our analysis indicates three primary factors driving its popularity among enterprise decision-makers and ecosystem providers.

First, enterprises are increasingly looking to Google Cloud to extract greater value from enterprise data—to liberate relevant data from enterprise and departmental siloes, standardize that data, combine it with external data sources, ask the right questions of it, and finally get the resultant insights in a meaningful form to enterprise decision-makers. These are all areas in which Google Cloud and its AI-first suite of tools and solutions excel, with enterprises using GCP-native tools such as BigQuery, Vertex AI, Bard (generative AI) and TensorFlow; data meshes and fabrics such as Dataplex and Dialogflow (for conversational AI); and others. However, before cutting-edge AI techniques can be applied, significant efforts are needed to standardize and modernize data

Gaining greater **value**
from **enterprise**
data is a prime
driver of the Google
ecosystem.



Executive Summary

platforms. This is where ecosystem providers play a crucial role, bringing a panoply of data migration frameworks, accelerators and automation solutions that enable faster and smoother transfer of databases into BigQuery format on GCP.

However, the role of ecosystem providers goes way beyond just data migration and modernization. Providers are critical in helping enterprises with data governance and compliance, creating analytical tools and dashboards for visualizing data, developing responsible AI frameworks, and identifying and developing specific AI/ML use cases. A notable development this year is the emergence of more industry and domain-focused AI/ML use cases; for example, the use of Vertex AI to turbocharge drug discovery in life sciences, AI platforms providing end-to-end visibility into grocery supply chains, or solutions to glean marketing insights from consumers' online browsing habits. Some providers are integrating Google's AI tools with IoT and edge computing technologies to provide insights into distributed energy infrastructure or enhance situational awareness for logistics and fleet management

operators. Yet others are building immersive conversational AI solutions to enhance CX or enabling data for digital twin simulations and industrial metaverse applications.

Second, sustainability remains a key driver of GCP adoption. With data centers consuming around 3 percent of the total global energy supply annually and ICT infrastructure responsible for up to 3.9 percent of global carbon emissions, many enterprises consider the sustainability of computing infrastructure and operations as core to achieving net-zero goals[1]. With its focus on green and renewable energy use, GCP becomes a strong choice for enterprises looking to reduce their broad IT-related carbon footprint. Yet Google Cloud's sustainability credentials extend far beyond the carbon footprint of the platform itself: Google Cloud increasingly provides a platform and toolset to help enterprises embed wider sustainability improvements across their organizations. Many providers use GCP to create environmental, social and governance (ESG) reporting and analysis tools; some create GCP-based offerings around climate-risk intelligence or supplier sourcing risks in far-

flung supply chains; and others implement SAP solutions on GCP to manage product carbon footprints.

The third driver of GCP's growth relates to cloud economics. In an environment of weak economic growth and persistent inflationary pressures, cloud spending—and how to optimize it—has become a growing preoccupation for enterprise IT leaders. GCP is attractive because of its generally competitive pricing and its ability to support enterprises' multicloud strategies, reducing the risks of technical lock-in, increasing bargaining power vis-à-vis the other hyperscalers, and providing a raft of open-source and integratable tooling. Google Anthos also provides a versatile platform for firms following a multicloud-native strategy.

Ecosystem providers play a key role in helping firms optimize their cloud economics, for example, by providing consulting and advisory services that help firms evaluate different cloud options and create roadmaps for a multicloud strategy. This year ISG notes the growing prominence of sophisticated FinOps

frameworks and tools developed by several providers for GCP and other public clouds. These FinOps tools can measure cloud spend and relative usage down to the departmental or team level, identify opportunities to eliminate unnecessary cloud spending, re-allocate capacity to areas of higher business demand, and potentially institute charge back mechanisms in areas of overspending.

Within this broad picture of GCP growth and evolution, several other trends were evident in the Google Cloud ecosystem. Generative AI—a class of large-language ML models that can create text, images, and code—has penetrated the public consciousness and attracted huge media attention, notably through OpenAI's ChatGPT. Most major Google ecosystem providers are experimenting with transformer models in some fashion, and several are launch partners for Google Cloud's Bard platform. However, full-fledged, enterprise-grade applications of generative AI are still scarce. Many solutions are still at a nascent stage, with the promise of more dramatic innovations to come.



Executive Summary

With the rapid growth of the Google ecosystem, GCP skill gaps are becoming a significant challenge for many service providers, particularly in areas such as data engineering, ML and site reliability engineering (SRE). Service providers are responding by ramping up their investment programs in GCP certifications, drawing on global and regional delivery models and developing more talent versed in multicloud deployments and operations.

The overall market for cloud services in Europe remains mixed, with growth dampened by the global tech slowdown, a sluggish economy and increased pressure on IT budgets. According to the ISG Index, the demand for IT and business services in Europe declined by 5 percent YoY in the first quarter of 2023, with managed services declining by 4 percent YoY and cloud-based services down by 6 percent. Regional demand varied, with U.K. managed services down by 2 percent YoY, and DACH down by 21 percent YoY, but France managed services revenues remained buoyant with 27 percent YoY growth. EMEA IaaS dropped 10 percent YoY in the

first quarter, with the top three hyperscalers experiencing a 12 percent YoY decline, the first ever recorded.

Yet within this overall picture of slowing cloud consumption in Europe, Google Cloud appears relatively resilient. Nearly every ecosystem provider we surveyed for this report saw increasing demand for GCP and related services in Europe. Demand remains robust in the U.K., moderate in the DACH and Benelux regions, and relatively weak in the Nordics. Google Cloud's ability to weather the broader tech slowdown is due in part to its focus on the areas that are now top-of-mind for enterprise IT decision-makers: demand for big data, ML and analytics capabilities; the need for data modernization and integration; the growing sustainability imperative at the C-level; an increased focus on cloud economics and FinOps solutions; and the increasing integration of data and cloud strategies. With pressure on enterprise budgets, some providers see more demand for fast-cycle POCs and projects with clear ROI in Europe. However, enterprises are

still cautious with their risk appetites for wider cloud transformation, and demand for lift-and-shift implementations on GCP is still significant. Finally, with European regulations around data and AI continuing to emerge, there is a growing demand for sovereign cloud solutions for GCP in Europe, with enterprises looking for additional capabilities to secure and segregate their data within defined geographic borders.

Ecosystem providers are ramping up Google Cloud certifications, aligning go-to-market strategies and setting up dedicated business units to capture the growing Google Cloud market opportunities in Europe.





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	Contender	Product Challenger	Contender	Not In	Not In
Ancoris	Product Challenger	Rising Star ★	Product Challenger	Not In	Product Challenger
Appsbroker	Product Challenger	Not In	Contender	Not In	Not In
Atos/Eviden	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
Capgemini	Not In	Not In	Not In	Not In	Leader
Cognizant	Leader	Leader	Product Challenger	Product Challenger	Not In
Computacenter	Product Challenger	Not In	Not In	Not In	Not In
CTS	Product Challenger	Not In	Not In	Not In	Product Challenger



Provider Positioning

Page 2 of 5

	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Datonic	Not In	Product Challenger	Not In	Not In	Not In
Deloitte	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Devoteam G Cloud	Market Challenger	Not In	Product Challenger	Contender	Product Challenger
DoIT	Not In	Contender	Not In	Not In	Not In
DXC Technology	Not In	Not In	Not In	Product Challenger	Not In
Emergya	Not In	Product Challenger	Not In	Not In	Not In
Genpact	Not In	Product Challenger	Not In	Not In	Not In
GFT	Not In	Leader	Not In	Not In	Not In
Go Reply	Product Challenger	Contender	Not In	Not In	Not In





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	Leader	Leader	Product Challenger	Product Challenger
Kyndryl	Product Challenger	Contender	Contender	Contender	Not In
LTIMindtree	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
Mphasis	Product Challenger	Product Challenger	Contender	Contender	Not In
Netpremacy	Not In	Not In	Not In	Not In	Product Challenger
Nordcloud	Not In	Not In	Not In	Not In	Contender
oXya	Not In	Not In	Not In	Product Challenger	Not In





Provider Positioning

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	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
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	Contender
Revolgy	Not In	Not In	Contender	Not In	Contender
Sabio	Not In	Product Challenger	Not In	Not In	Not In
SFEIR	Contender	Contender	Not In	Not In	Not In
Softserve	Not In	Product Challenger	Not In	Not In	Not In





Provider Positioning

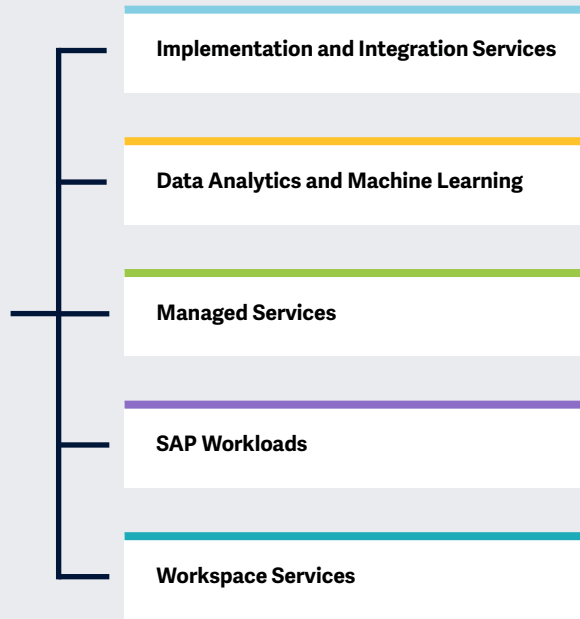
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	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Sopra Steria	Market Challenger	Not In	Market Challenger	Not In	Not In
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra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



Key focus areas of Google Cloud Ecosystem 2023 study.

Simplified Illustration; Source: ISG 2023



Definition

Google Cloud is one of the world's most prominent public cloud and technology providers. The technology giant's capabilities and services have evolved rapidly in recent years, with Google Cloud supporting the data workloads and applications of several leading enterprises. It has significantly advanced application modernization by developing Kubernetes, an open-source container orchestration platform. It has also pioneered developments, tools and assets in data analytics and machine learning.

Despite these advances, many enterprises struggle to fully integrate the Google Cloud suite of technologies and capitalize on the platform's rich native tools and features. They therefore seek assistance from the ecosystem surrounding Google Cloud, a community of global system integrators (GSIs), IT-managed service and consulting providers and ISVs. These providers have many capabilities and specializations, including migration and implementation, licensing and

cost management, governance and security, application development, machine learning, automation and citizen development.

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



Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following 5 (number of quadrants) quadrants for services: 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 with the following:

- Transparency on the strengths and weaknesses of relevant providers/
- A differentiated positioning of providers by segments (quadrants)
- Focus on regional market

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

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$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 Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

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.

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.

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 the ability of providers offering implementation and integration services that help design, build and migrate services in hybrid and multicloud environments.

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

Enterprises embrace several serverless tools for scalable, event-driven applications and services, such as Cloud Functions and Cloud Run. They are also interested in developing reference architectures, using automation solutions, and leveraging DevOps tools and CI/CD practices during implementation to provide faster time to market.

Low code/no code is another major focus area among enterprises, and they have been investing in GCP tools such as Google AppSheet and BigQuery ML, which are anticipated to grow in the next few quarters.

Enterprises partner with providers with end to end implementation capabilities, along with hybrid and multicloud setups offering the highest level of security for applications and infrastructure. Providers should possess quality talent, global delivery capabilities and a tailor-made pricing model to be a preferred partner.



Technology Professionals should read this report to know providers' relative positioning and capabilities to effectively use Google Cloud implementation and integration services and how they are compared in the market.



Procurement professionals should read this report to understand the capabilities of Google Cloud implementation and integration service providers in Europe and the competitive edge offered by them.

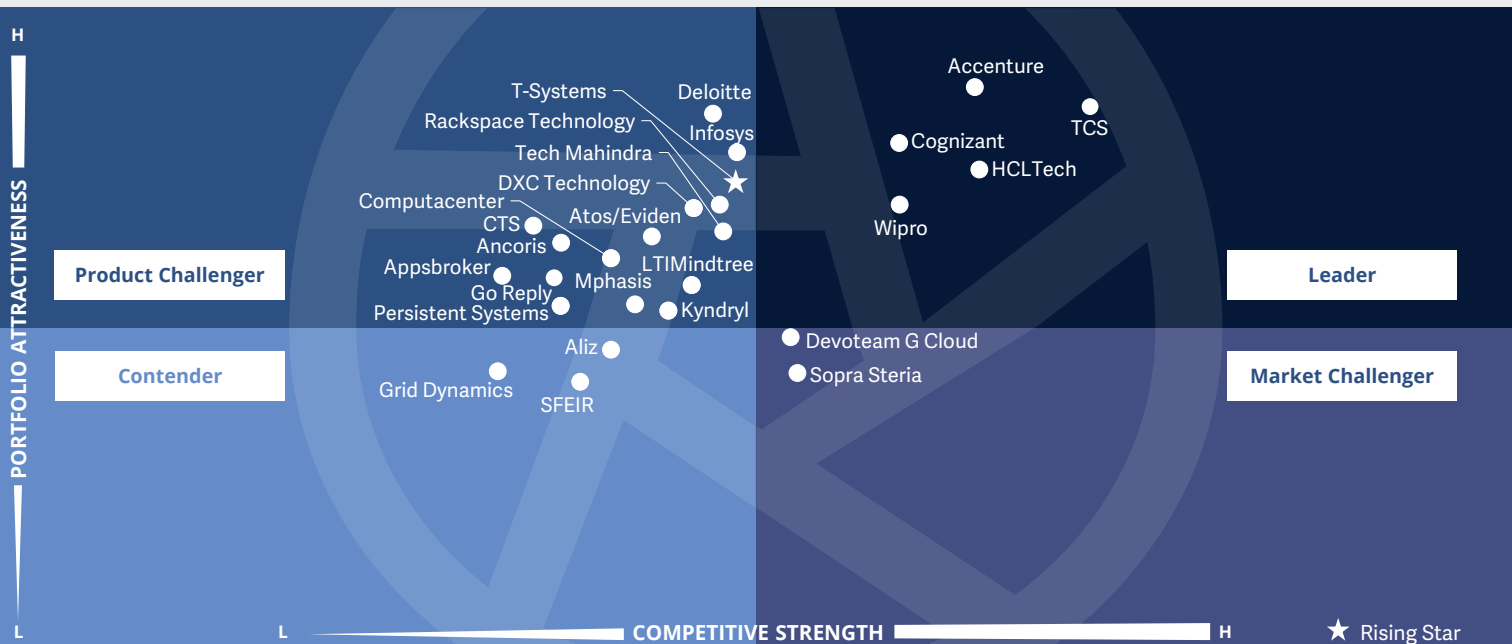


Digital Professionals should read this report to know the positioning of Google Cloud implementation and integration providers and how they can impact clients' ongoing transformation initiatives.



Google Cloud Partner Ecosystem Implementation and Integration Services

Europe 2023



This quadrant assesses service providers that offer **implementation, migration and modernization services for GCP**. Providers emphasize **multicloud** strategies using GCP, with a focus on **FinOPs** and **cloud security**.

Mark Purdy



Implementation and Integration Services

Definition

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

Eligibility Criteria

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



Implementation and Integration Services

Observations

Demand for Google Cloud integration and implementation services in Europe continues to grow, with an increasing need for traditional lift-and-shift migrations and multicloud modernization projects. ISG discerns several trends within this space. First, many service providers have invested significantly in assets and accelerators to speed the migration to GCP, incorporating workload discovery tools, pre-configured environments and automation features. Second, nearly every leading provider now infuses strong sustainability and ESG features into its cloud architectures and solution sets for GCP, such as green clouds and application architecture, energy use and carbon footprint cloud reporting tools, or specific offerings around climate intelligence or supply chain sourcing risks. Third, although not yet on the scale of the Azure industry clouds, providers invest in a raft of industry and point solutions for GCP in areas as diverse as digital banking, 5G telecoms, manufacturing supply chains and healthcare payment systems. Fourth, with the global slowdown

in cloud spending and increased business focus on cloud costs, many providers focus on optimizing cloud costs through ever more analytical FinOps tools and frameworks or using SRE and global/regional delivery models. Fifth, enterprises are still extremely cautious about the location and security of their data on public clouds, especially in highly regulated industries. Complying with European data sovereignty rules is also a major concern for enterprises in the region. Providers respond with specific sovereign-cloud offerings, incorporating additional safeguards and firewalls around the geographic storage of their cloud systems and data.

From the 35 companies assessed for this study, 25 have qualified for this quadrant with five being Leaders and one Rising Star

accenture

Accenture's large global Google Business Group offers a wide range of industry, functional and horizontal (technology) solutions for GCP. It continues to invest in growing its substantial base of Google Cloud professionals and certifications.



Cognizant offers a wide range of industry and functional solutions for GCP, focusing on ESG. It also has expertise in deploying edge solutions on GCP. Cognizant has won several important GCP clients recently.

HCLTech

HCLTech offers a comprehensive range of implementation and integration services for GCP, with a focus on sustainability-based transformation. It has recently expanded its existing network of nine Google Cloud delivery centers, with an additional three in Romania, Poland and Canada.



TCS offers a comprehensive set of implementation and migration services for GCP. It continues to invest significantly in growing its talent base through its G-Skool virtual coaching school for GCP certifications.



Wipro has significantly increased its focus on Google Cloud, realigning its go-to-market model with the Google Cloud business, ramping up GCP certifications, and investing in developing a comprehensive range of new industry solutions for GCP.

T Systems

T-Systems (Rising Star) emphasizes its Sovereign Controls offering, incorporating a host of infrastructure and data controls to help clients meet infrastructure and data sovereignty requirements on GCP.





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 providers in Europe and how they can address the key challenges enterprises face. Our assessment is based on the depth and breadth of the providers' service offerings and market presence.

Customers are investing in data fabric and data democratization concepts that integrate various data assets, enabling cross-collaboration among technical and business users and drastically reducing the time required to manage data. Data governance is another area of interest for customers, and successful implementation of data governance, business glossary and data privacy strategies enables them to monetize data.

Enterprises that focus on MLOps, analytics ops and managed services around operations are becoming more prevalent to support various forms of data consumption. At the same time, data engineering is becoming more challenging due to an increase in data volumes. Hence, automating non-value-added activities in data engineering becomes essential.

Enterprises partner with service providers with deep expertise in data analytics and ML and a top-notch talent ecosystem and delivery ecosystem globally.



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



Procurement Professional should read this report to understand the capabilities of Google Cloud data analytics and ML service providers in Europe and understand the competitive edge offered by them.

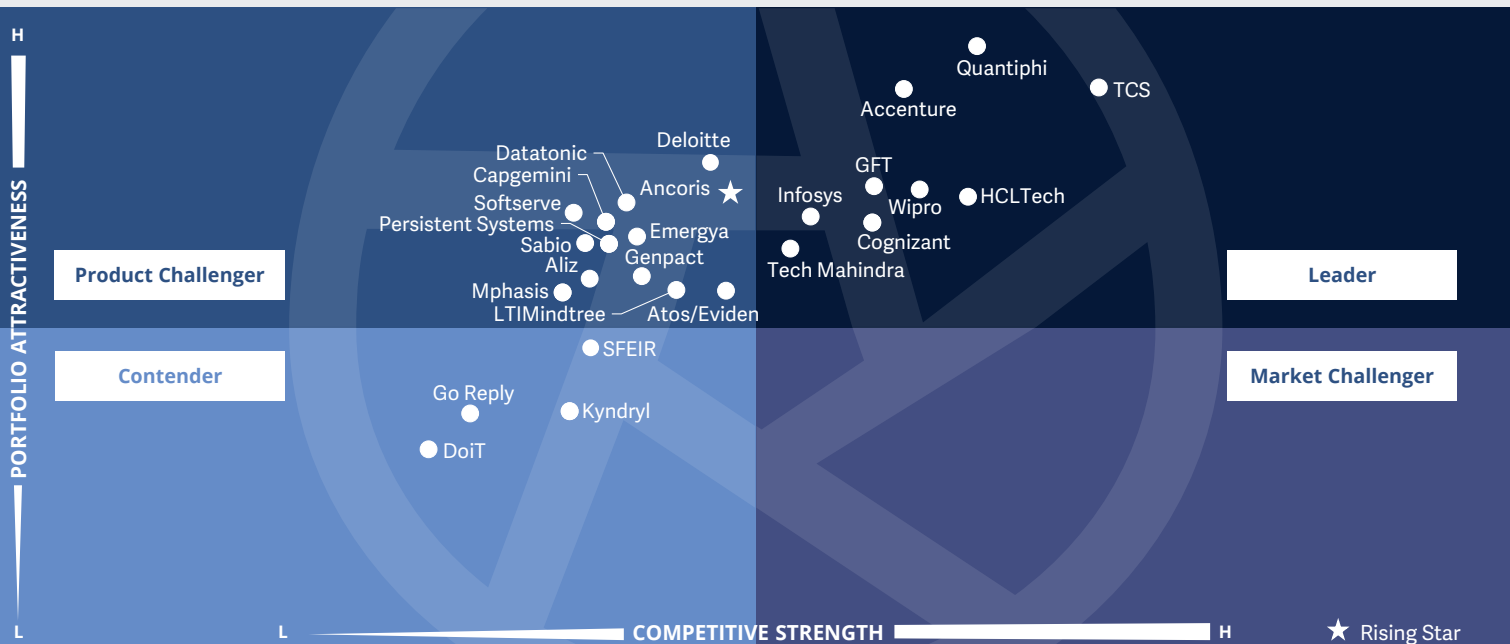


Digital Professionals should read this report to understand the positioning of Google Cloud data analytics and ML service providers and how they can impact clients' ongoing transformation.



Google Cloud Partner Ecosystem Data Analytics and Machine Learning

Europe 2023



The quadrant focuses on data analytics and ML (DAML) services for GCP. Providers emphasize their **data migration** capabilities and **accelerators** and develop **industry** and **functional** use cases for clients.

Mark Purdy



Data Analytics and Machine Learning

Definition

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

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

Eligibility Criteria

1. Scope and use of relevant **tools and technologies**
2. Integration and innovation of holistic **DAML services** and solutions
3. Availability of practices and programs to upgrade skills and **boost customer success** (for example, consulting or best practice frameworks, ROI identification and business case development)
4. Availability, experience and certifications of resources and competencies in the **GCP DAML-related tech stacks**
5. Availability of **GCP-focused offerings, roadmaps and innovations** (current and planned)
6. Number and reputation of case studies and client examples about **DAML services and solutions** on GCP
7. A point of view around recent developments in machine learning, such as **large language models**
8. Strong focus and expertise in a broad range of GCP's AI-driven tools to help enterprises move away from **conventional data management practices and management frameworks**
9. Focus on building **industry-based solutions** to resolve industry-specific business problems



Data Analytics and Machine Learning

Observations

DAML on GCP represents one of the fastest and most intensely competitive parts of the Google ecosystem in Europe, as enterprises seek to gain greater insights and competitive advantage from their data. ISG sees several important trends in this arena. First, there has been a surge in demand for data migration and modernization services, as enterprises seek to marshal data from organizational siloes and legacy databases on more modern, BigQuery-enabled data platforms. Providers are helping enterprises explore new data architectures, moving from old-fashioned data lakes to AI-enabled data meshes and fabrics. Better data governance is seen as a prerequisite for firms' citizen AI and data democratization initiatives and critical to developing new AI use cases and industry applications. Second, and relatedly, providers are investing significantly in data migration tools to move existing databases—Databricks, Snowflake or Teradata, for instance—to GCP securely and rapidly. Third, providers are crafting new vertical-specific solutions using GCP-native tools in areas such

as trade controls, consumer marketing and supply chains. Fourth, providers are integrating other elements of next-generation technologies into their DAML offerings, for example, by connecting data from IoT devices (such as in transport fleets or factories) to power digital twins or industrial metaverse applications. Fifth, most leading providers are looking to integrate large language or generative AI technologies into their DAML offerings for GCP. Some are launch partners for Google Bard, although enterprise applications of generative AI are still at an embryonic stage.

From the 37 companies assessed for this study, 25 have qualified for this quadrant with eight being Leaders and one Rising Star.



Accenture has invested in developing a vast repertoire of data migration, data modernization and AI tools and solutions for GCP. It has developed many industry and functional AI solutions using Google Cloud AI technologies, for example, in intelligent supply chains.



Cognizant has developed a comprehensive offering of data modernization and ML services on GCP, and has recently seen significant growth among large enterprises in Europe for its DAML services.



GFT has invested significantly in building a new range of data migration accelerators to help clients migrate faster to the GCP. In April 2023, GFT completed the acquisition of Targens, a Germany-based company specializing in banking, compliance and digital innovation.



HCLTech has invested in developing a passel of data analytics and ML (DAML) point and vertical solutions for GCP. It also has experience in implementing data migration and machine learning solutions using Google Cloud technologies for enterprises in Europe.



Infosys has developed a range of generative-AI services and solutions on GCP. It has significant experience using Google Cloud technologies to implement DAML solutions for major enterprises in Europe and globally.



Quantiphi continues to expand its already extensive portfolio of AI solutions for GCP. It has increased its market presence in Europe by creating a dedicated sales force and appointing a senior European technology leader to its board. It has also acquired Accreon, a healthcare technology company based in Canada.



Data Analytics and Machine Learning



TCS offers a broad array of data migration, analytics and ML services for GCP. It has developed a range of AI-powered functional and industry solutions and has extensive experience in delivering complex, large-enterprise projects in this space.



Tech Mahindra is a seasoned practitioner of data migration and modernization for GCP, offering a raft of solutions and accelerators in this space. It recently expanded its global innovation network by establishing a Telco Smart Analytics Lab dedicated to Google Cloud in Milton Keynes, U.K.



Wipro invests significantly in data lake migration and modernization services for GCP. It works collaboratively with Google Cloud on new generative AI-based industry solutions. It also recently achieved the Data Analytics specialization from Google Cloud.



Ancoris continues to emphasize its persona-based approach to DAML solutions and services for GCP. It has invested in leadership positions, talent development and technical delivery capabilities, bolstering its growth prospects over the coming months.





"Ancoris' persona-based approach and extensive client traction in solution development make it a Rising Star in the DAML services space in Europe."

Mark Purdy

Ancoris

Overview

Ancoris is a Google pure-play digital technology and services company headquartered in the U.K. It provides end-to-end services on Google Cloud, including cloud implementation and managed services, workspace solutions, and DAML services. Ancoris has more than 100 employees globally. It has been a partner of Google Cloud for 15 years and is one of the three strategic enterprise partners for Google Cloud in the U.K. It has three specializations, including Data Analytics Services. Ancoris has more than 400 customers globally, with a large proportion in the U.K.

Strengths

C-suite decision-making: One of Ancoris' differentiators is its focus on using DAML tools to help C-suite executives make better decisions. To this end, it offers five persona-based labs. For example, the Ancoris GreenLab provides insights to CIOs and sustainability leaders on the carbon footprint of on-premises and hosted data center deployments.

Client traction: Ancoris has a large client base for its DAML services, especially in the U.K. and beyond. For a major healthcare provider, it built a data warehouse with a single patient view integrated with Google BigQuery. For a major household goods manufacturer, it created a data warehouse powered by Google Cloud with data visualization capabilities and executive

insights provided by Looker Studio. It has also created geo-location-based services (using Google Maps APIs) for a global food delivery company and for a leading U.K. insurance provider.

Key investments: Ancoris has been strengthening its management and investment capabilities over the last 24 months, creating new senior-level posts and bolstering its delivery capabilities and ability to retain and scale talent. These measures should provide a strong foundation for enhanced solution development and continued growth.

Caution

Ancoris should continue the pace of its product and service development, as new developments such as generative AI are likely to create significant disruption in the DAML space over the next few years. Ancoris should also consider introducing gain-share, risk-share and outcome-based pricing options into its commercial models.





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. ISG's assessment is based on the depth and breadth of the providers' service offerings and market presence.

Enterprises embrace cloud adoption to achieve better accessibility and effectiveness, flexibility to streamline operations and management, and instill agility and responsiveness. Enterprises and service providers consider intelligent cloud operations and reliability engineering as top priorities. Along with these, the multicloud adoption driven by Google Anthos drives platform efficiency and risk management.

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



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



Procurement professionals should read this report to understand the capabilities of Google Cloud managed service providers in Europe and learn how they compare with each other.

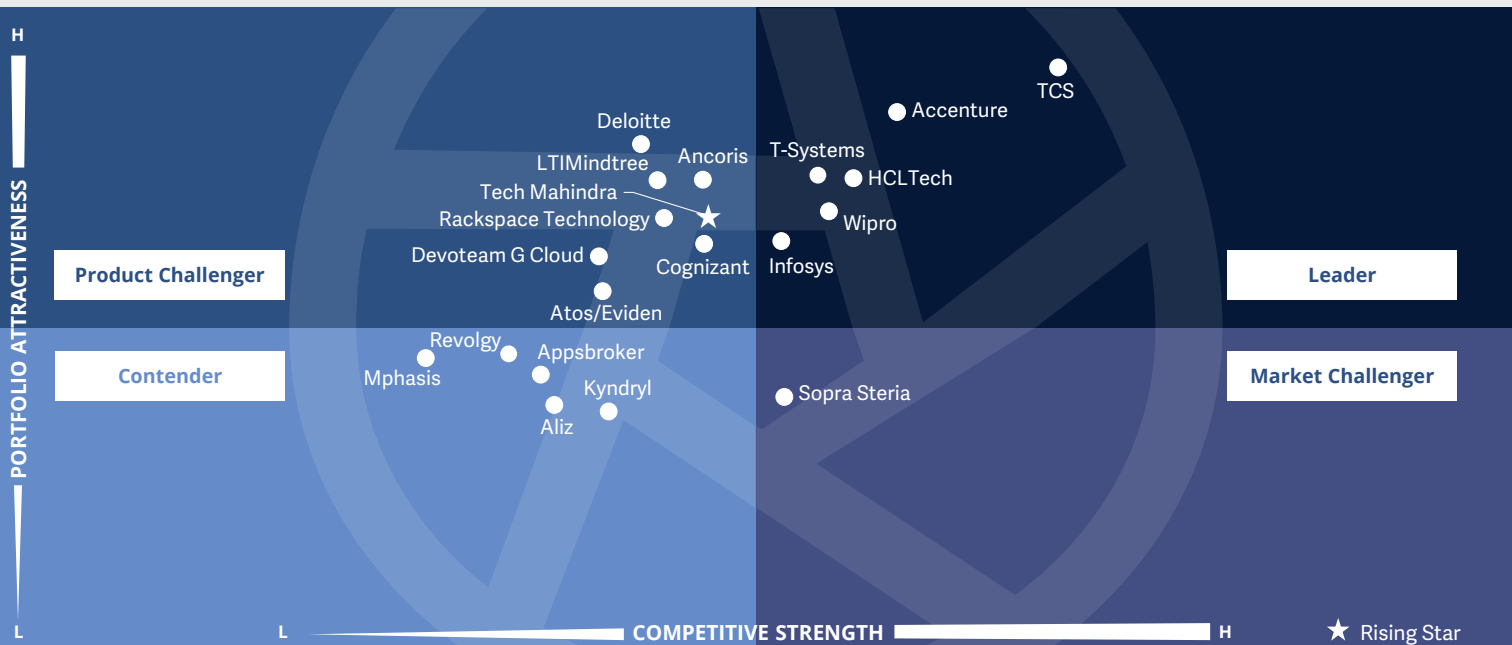


Digital Professionals should read this report to understand the positioning of Google cloud managed service providers and how they can impact clients' ongoing transformation.



Google Cloud Partner Ecosystem Managed Services

Europe 2023



This quadrant assesses service providers that offer **managed services for GCP**. Service providers increasingly emphasize GCP as part of a **multicloud** or hybrid managed service offering, with a strong focus on **FinOps**.

Mark Purdy



Managed Services

Definition

The quadrant assesses managed public cloud service providers offering professional and managed services to augment Google's built-in capabilities, including IaaS and PaaS. The professional and managed services include orchestration, provisioning, real-time and predictive analytics, and monitoring and managing a customer's public cloud and multicloud environments. The goal is to maximize the performance of enterprise cloud workloads, reduce costs and ensure compliance and security. Service providers typically offer significant levels of automation and transparency over the managed cloud resource pool to customers using specially developed or licensed cloud management platforms and tools. SLAs for managed services normally encompass a wide range of services to drive business value, such as data management and governance, machine learning capabilities, and ESG and sustainability

tools and assets. Managed service providers also have teams well-versed in GCP-native skills such as cloud-native operations, site reliability engineering (SRE) and platform reliability engineering (PRE). The maturity of managed services offerings for GCP can also include usage and impact of innovative IPs and tools and service delivery frameworks. These include cloud FinOps, automation tools to improve service availability and resilience, cloud and data security, regulatory compliance and governance tools.

Eligibility Criteria

1. Experience in **designing, building and managing public and multicloud environments** with a focus on the Google Cloud Platform
2. Supporting the development of **software code, cloud-native architectures** and legacy system integration
3. Experience in **implementing both Agile and DevOps** and integrating with clients' existing processes
4. Experience in **API automation and cloud analytics**
5. Possess well-developed **security practices** and capabilities
6. Strength of the provider's partnership with Google Cloud, measured by the number and category of **relevant certifications**, duration of its relationship with Google Cloud and evidence of strategic cooperation between the provider and Google Cloud
7. Proven use cases or proofs of concept (PoCs) in **healthcare, sustainability, banking, financial services and insurance (BFSI)** and other industry verticals



Managed Services

Observations

The managed services space for GCP continues to grow in scale and scope, often in a multicloud management or even serverless context. Cloud 2.0 is a topic of discussion among leading providers; the cloud is evolving beyond a cost reduction driver and becoming a key pillar of business innovation and strategy. In this context, traditional managed service features—patching, SLAs and security—are necessary but not sufficient conditions for competitive differentiation among providers, with enterprises now looking for advanced capabilities in areas such as intelligent automation, sustainability and industry-inflected cloud solutions. Several trends in the managed services space for GCP are now emerging. First, many leaders now offer a unified environment to manage hybrid and multicloud deployments, with different as-a-service layers across infrastructure, platforms and functions. Second, with cloud spending now becoming a major pre-occupation for enterprises, several leading providers heavily emphasize their FinOps offerings,

encompassing elements such as cloud automation, multicloud dashboards, granular cloud usage reporting, cloud sizing and various decision tools to optimize cloud capacity allocation across departments and teams. Third, data sovereignty—regulations covering the location and usage of data within defined geographic borders—is a major concern for many enterprises in Europe. More providers are now responding with managed sovereign cloud offerings, which provide additional safeguards and access controls around sensitive data. Given the growing focus of the EU on AI regulation in Europe, it seems likely that demand for sovereign cloud solutions will only increase over the next several years.

From the 32 companies assessed for this study, 20 have qualified for this quadrant with six being Leaders and one Rising Star.

accenture

Accenture's large global Google Business Group offers managed services for GCP with a strong focus on industry solutions, sustainability, and security and compliance.

HCLTech

HCLTech brings its expertise in automation and IT processes to its managed services for GCP. It has recently added three Google Cloud delivery centers in Romania, Poland and Canada.

Infosys

Infosys offers an extensive set of managed services for GCP, with a particular emphasis on FinOps maturity models to help clients optimize their cloud spend across different teams and units. Infosys is also notable for its deep expertise and provision of solutions for API management via Apigee.

TCS

TCS has invested in accelerators for GCP, notably its Cloud Lab on Google Cloud, an immersive and experimental setting where clients can develop and test solutions on GCP. It also continues to grow its already extensive cadre of GCP-trained and certified professionals.

T Systems

T-Systems continues to invest in its Sovereign Controls (powered by GCP) offering, focusing on helping European enterprises meet data residency and other digital sovereignty requirements on GCP.



Wipro offers a comprehensive range of managed services for GCP, incorporating hybrid, multicloud and cloud-native elements. It has invested in ramping up its Google Cloud talent base and has developed extensive expertise in GCP-related technologies.

TECH mahindra

Tech Mahindra, a Rising Star in Europe, offers a well-curated set of managed services for GCP in the region, with a notable emphasis on security and compliance services.





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. In the past few years, the implementation of SAP S/4HANA has been one of the critical milestones, either as a greenfield or brownfield implementation.

RISE with SAP is driving the adoption of S/4 HANA among enterprises. Also, the end of the SAP ECC lifecycle pushes enterprises to adapt and migrate to the SAP HANA platform. However, high CAPEX investments in the HANA database give an excellent opportunity to use GCP due to the OPEX offer model and other incentives. However, enterprises are interested in understanding the value proposition of

Google Cloud vs. other hyperscalers such as AWS and Azure. They look for benefits offered by cloud platforms such as analytics, AI, ML and IoT, while assessing the target cloud platform rather than just running SAP workloads for cost benefits.

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

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



Technology Professionals should read this report to understand the relative positioning of providers offering SAP on GCP in Europe and how they support enterprises' cloud transition requirements for SAP.

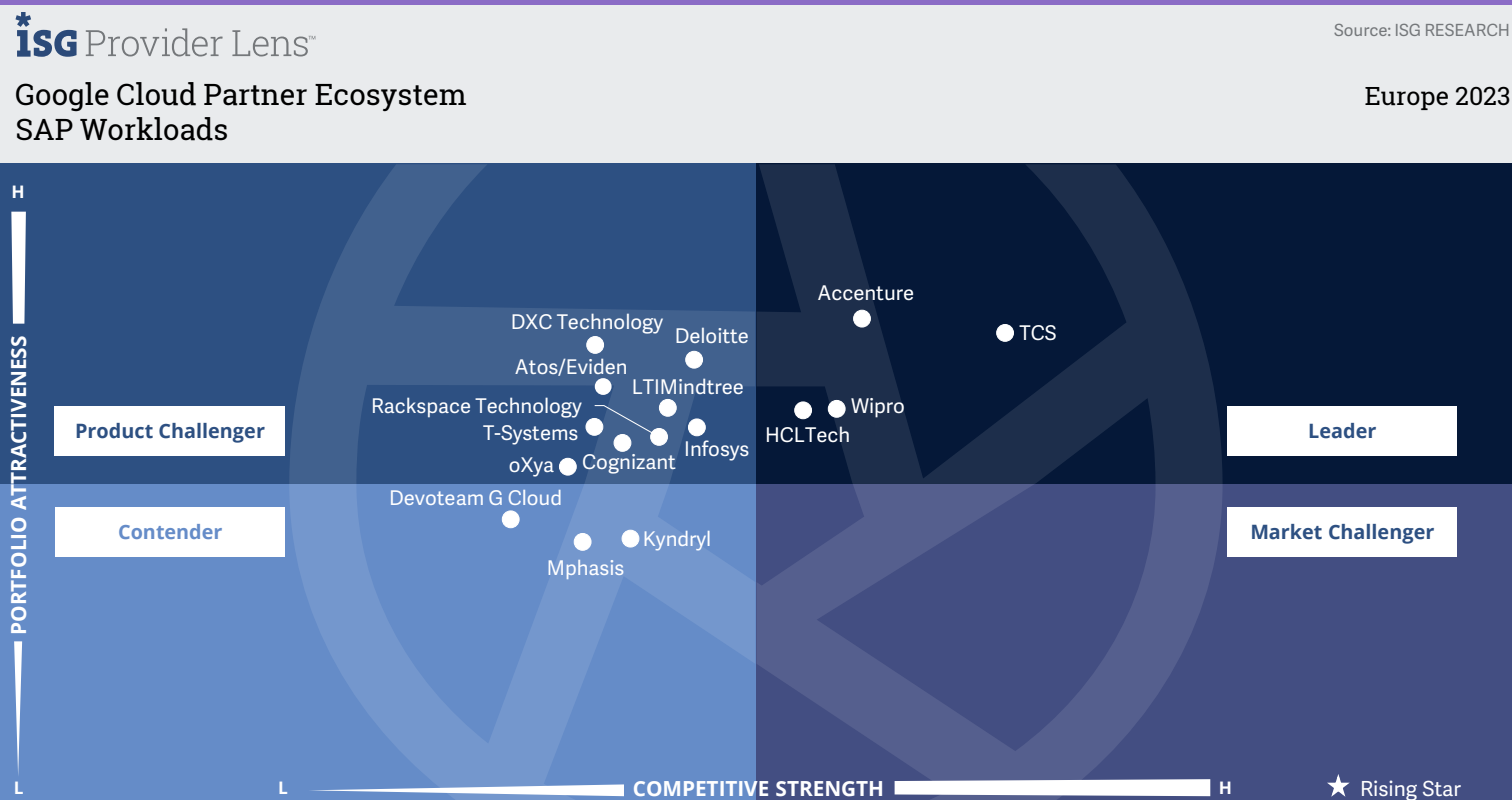


Finance Professionals should read this report to understand the positioning of providers offering SAP on GCP and how the implementation improves their critical tasks.



Procurement should read this report to understand the relative positioning of SAP-on-GCP providers in Europe and the trends that may influence partner selection.





This quadrant assesses service providers that offer **implementation, migration** and **managed services** for **SAP workloads** on GCP. Providers emphasize **accelerators** and **automation** assets and **functional** solutions.

Mark Purdy



SAP Workloads

Definition

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

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

Eligibility Criteria

1. Scope and depth of service portfolio for **migrating workloads** to SAP on the Google Cloud Platform
2. Experience and expertise in rapid **process discovery, roadmap creation, migration impact assessment** and rightsizing assessment
3. Ability to **develop and design new processes** and customer outcomes for SAP on Google Cloud
4. Offering **customization, provisioning and support** to implement SAP applications and services
5. Ability and willingness to support **hybrid cloud** and hybrid provider environments
6. Strength of the provider's relationship with Google Cloud, measured by the number and type of **Google Cloud Certifications** from the Google Certified Cloud Program, and its relationship with SAP, measured by relevant SAP certifications
7. Experience in Google's site **reliability engineering principles**
8. Ability to support SAP's **software-as-a-service** (SaaS) model on GCP



Observations

The leader space for SAP workloads on GCP continues to be sparsely populated, as only a few of the largest Global System Integrators (GSIs) have the expertise and client experience to compete at the top level in SAP, typically one of the most complex areas of IT implementation and migration. ISG continues to see the leaders heavily emphasize their deep and extensive partnerships with SAP and Google Cloud. These leaders typically offer a comprehensive set of services for SAP on GCP, including consulting and advisory services, migrations, implementations, modernization and various managed services for SAP. Leaders have also invested significantly in an array of accelerators and automation assets to accelerate the migration of SAP workloads to GCP. Most have invested in industry-inflected solutions for SAP on GCP in sectors such as aerospace and defense, retailing or natural resources, as well as in a variety of functional and domain solutions such as supply chain, finance, HR, smart warehouses and logistics. Some are incorporating sustainability elements into

their SAP on GCP offerings such as S/4 HANA implementations for ESG reporting. ISG also notes the emergence of provider offerings using RISE with SAP on GCP. Leaders are also actively incorporating elements of automation and ML into the SAP offerings, providing, for example, automated migrations or implementations of Google Cortex using SAP data.

From the 29 companies assessed for this study, 16 have qualified for this quadrant with four being Leaders.

accenture

Accenture, a seasoned SAP practitioner, offers a broad range of migration, implementation and data services for SAP on Google Cloud. It has more than 7,000 professionals certified in Google Cloud and tens of thousands of SAP practitioners globally.

HCLTech

HCLTech offers managed services and a full-stack approach to SAP workloads on GCP. It has also invested in developing various industry solutions for SAP on Google Cloud.



TCS brings a wide range of accelerators and automation assets to its offering for SAP workloads on GCP. It continues to invest significantly in growing its talent base for SAP and GCP.



Wipro offers a broad spectrum of services for SAP workloads on GCP and has considerable experience in complex migrations and modernizations for blue-chip enterprises in Europe and globally.





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 suite, collaboration, and content tools for enterprises.

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

In Europe, Google Workspace has recently seen increased adoption among individuals, enterprises and educational institutions. Below are some trends and developments related to GWS.

Enterprises look forward to a unified experience where they can monitor and administer the whole gamut of GWS. They partner with a provider with end-to-end expertise and experience in GWS and associated consulting and advisory, implementation and development, and change management strategies to enable enterprises with digitally transformed workspaces.

Providers should invest in building their capabilities around Google Workspace with expertise, customer PoV, reference architecture, frameworks and a quality talent ecosystem with global delivery capability.



Technology Professionals should read this report to understand providers' relative positioning and capabilities to effectively consume GWS and how they are compared in the market.

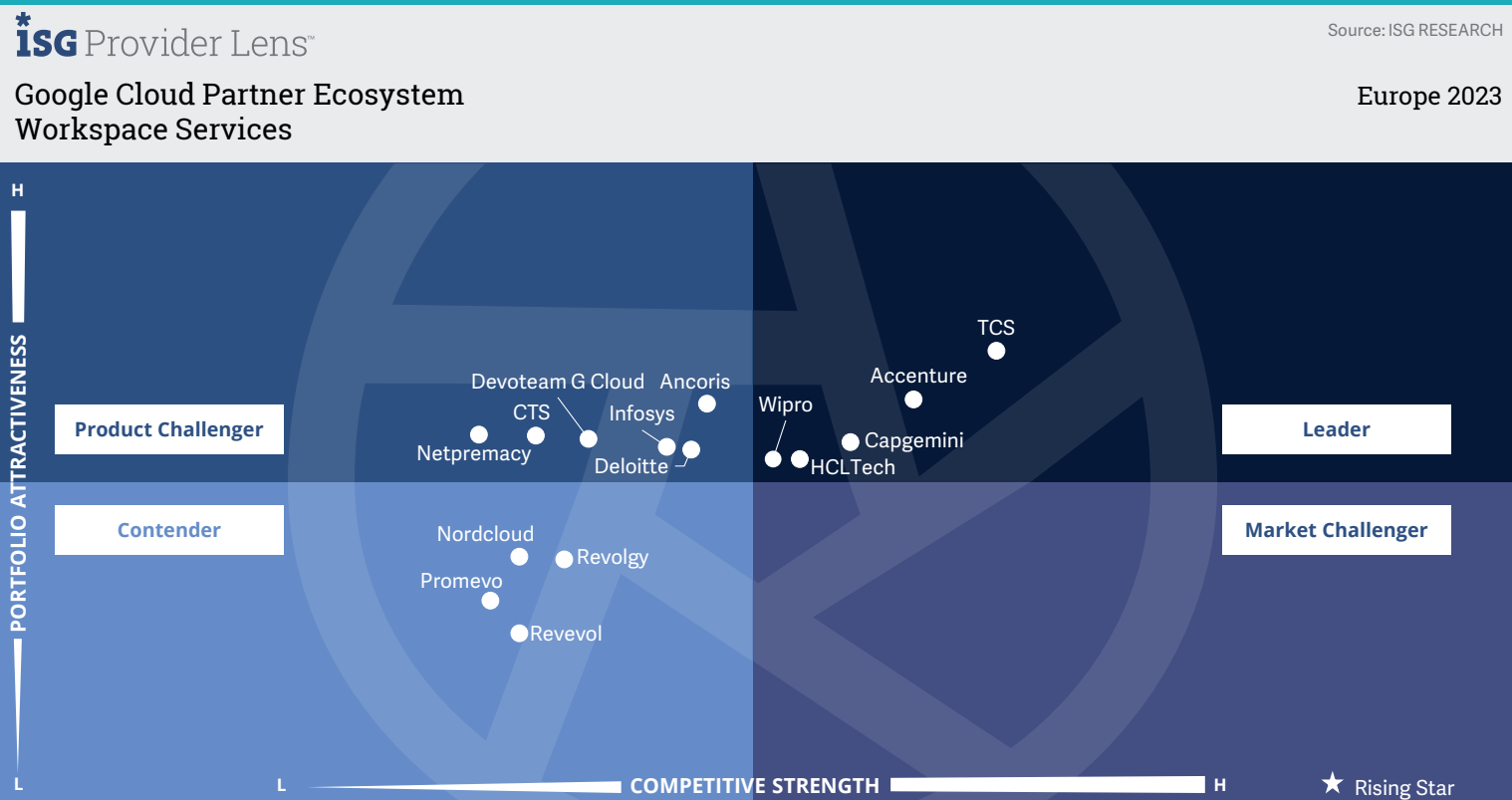


Workspace Professionals should read this report to understand the capabilities of GWS providers in Europe and how they compare to one another.



Digital Professionals should read this report to understand the positioning of GWS providers and how they can impact clients' ongoing transformation.





This quadrant assesses service providers that offer **implementation, migration and managed services** for Google Workspace. Providers emphasize their **workplace consulting** capabilities and **human-centered** approaches to migration and adoption.

Mark Purdy



Workspace Services

Definition

This quadrant assesses GSIs and IT providers offering advisory, migration and integration services for Google Workspace, Google's suite of productivity and collaboration and content tools for enterprises. Workspace provides a broad range of apps, including Gmail, Meet, Chat and Drive, to drive enterprise productivity and real-time collaboration. Google Workspace, which evolved from the G Suite productivity package, is developing rapidly and incorporating intuitive analytics, numerous data and device administration, and security features. Google Workspace brings personalized user experiences into controlled and secure enterprise environments. It allows multidevice and multichannel workspace integration and helps users get a seamless experience across their professional communication and content sharing practices. Enterprises seek providers that can orchestrate, integrate and augment the native Workspace functionality through

design and build services on intranets, websites and integration with additional enterprise and third-party data sources and applications. They should also provide training and change management services, advanced data search and retrieval capabilities, and license and cost management and enable advanced security management for data and devices. Enterprises are primarily looking for providers that can easily integrate Workspace's native tools and make data and content flow seamlessly across an enterprise.

Eligibility Criteria

1. Ability to offer **advisory, design and consulting services** for Workspace services on Google Cloud
2. Experience in providing **training and change management services** for Workspace services
3. Experience in **legacy migrations to Workspace**, especially from Lotus Notes-based **on-premise**
4. **email systems**
5. Demonstrate advanced **content analytics and data search capabilities** for company content across Workspace
6. **Administration, IT governance and security services** for data workloads and modern endpoint management
7. Offer services and frameworks to **accelerate low-code/ citizen developer** activities on Workspace
8. Provide organization-specific **data analytics and insights around Workspace**, such as adoption rates and patterns of working and collaboration



Workspace Services

Observations

The adoption of the hybrid working model by most enterprises has increased the use of Google Workspace services (GWS) to improve the user experience and employee engagement through collaboration and productivity tools. This adoption by enterprises is driving service providers to invest and develop end-to-end service offerings by improving their partnership with Google. Google Workspace's ease of use and accessibility make it the preferred option for workers across geographies and industries to improve work-from-home productivity. The suite empowers users with frequently used critical tools integrated into a single platform, creating a unified collaborative medium. Service providers offer innovative and transformation-led engagement with enterprises embracing the digital workplace to improve employee collaboration and productivity.

Although the adoption of G Suite is less compared to Teams, there has been a substantial spike in the adoption by enterprises in the last 12 months as it commands a scalable, cloud-based workspace, ensuring secure, flexible and borderless collaboration.

However, only a few providers are advancing their capabilities around GWS. These service providers are quick enough to improve their implementation, migration and change management capabilities to support enterprises in their transformation journey.

Service providers have developed several architectures and frameworks, making the implementation and migration of Google Workspace easier. The greenfield and brownfield implementations are gaining more traction as enterprises advance their workspace journey. However, the demand for brownfield implementation is high as providers lack the right expertise and right skill sets.

Google and providers should continue investing in developing integrations that enable enterprises to connect two different platforms, providing much-needed selections for the hybrid model to succeed.

From the 24 companies assessed for this study, 15 have qualified for this quadrant with five being Leaders.

accenture

Accenture offers a suite of services to facilitate enterprises to migrate and manage GWS, including consulting and advisory, technical development and change management. It has enabled large-scale migrations to Workspace for clients such as Imerys, Veolia, and Dalkia Westenergy.

Capgemini

Capgemini and Google Cloud help enterprises adapt to the changing working model to be future-ready. Capgemini is one of the largest and most experienced partners with deep expertise in implementing, migrating and supporting Workspace projects.

HCLTech

HCLTech provides a service catalog-based approach powered by its automation tools such as Velocity and DRYiCE for personification, end-user experience analytics, adoption, and change management.

tcs

As one of the experienced partners, **TCS** has developed various tailor-made offerings to enterprises that enable them to migrate to the GWS quickly.

wipro

Wipro, through its Thrive offering, helps enterprises with capable organization change management (OCM) practices and processes designed to improve the security and ease of workplace transformations.





Appendix

The ISG Provider Lens™ 2023 – Google Cloud Partner Ecosystem report 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 services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of May 2023 for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

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



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Mark Purdy is a Lead Analyst for Europe at ISG Provider Lens™ and brings more than 25 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

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Research and Global Overview Analyst



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Srinivasan PN is a Research Specialist at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on AWS & Google Ecosystem, Digital Engineering, Manufacturing, and Mainframe. His area of expertise lies in engineering services and digital transformation. Srinivasan has close to 9 years of experience in the technology research industry, and in his prior role, he carried out research delivery for both primary and secondary research capabilities.

Srinivasan also authors enterprise context reports and global summary reports for his expertise. He also supports the advisors with his research skills and writes papers about the latest market developments in the industry.





IPL Product Owner

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



iSG Provider Lens™

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

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

iSG Research™

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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.





JUNE, 2023

REPORT: GOOGLE CLOUD PARTNER ECOSYSTEM