

Google Cloud Partner Ecosystem

Data Analytics and Machine Learning

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:

GFT ■

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Report Author: Mark Purdy

Data and sustainability drive the Google ecosystem

In recent years, Google has moved far beyond its origins in search engines and consumer technologies to become a major force in cloud and business-to-business (B2B) technologies. As one of the largest hyperscale public cloud providers, the technology titan provides technologies that underpin the operations of thousands of enterprises of all sizes across the world, helping them sell goods and services, organize supply chains and communicate with customers. Google's advanced capabilities in AI, data analytics and machine learning are becoming critical to business decision-making, providing unique insights into every aspect of business, from consumer

analysis to financial forecasting to product inspection, among many others.

Despite this growing prevalence, many enterprises are still relatively new to the Google Cloud Platform (GCP), at least compared with those of the other hyperscalers, and they often struggle to fully capitalize on the platform's native capabilities and functionalities. They, therefore, turn for help to the Google Partner ecosystem, a complex web of global system integrators (GSIs), service providers, independent software providers (ISVs), big data and analytics specialists, and boutique consultancies. With this ecosystem now approaching a critical mass in Europe in terms of both depth and variety of services, ISG is focusing on the ecosystem for the first time to provide IT and business decision makers with a clearer view of the relative strengths and weaknesses of different providers across five quadrants: Implementation and

Getting greater value from data is key for enterprises



Executive Summary

Integration services, Managed Services for Google Cloud, Data Analytics & Machine Learning (DAML), SAP Workloads and Google Workspace Services.

Enterprises are turning to GCP for many reasons, but fundamentally to take advantage of three core strengths, as well as differentiators, of the platform: data analytics; sustainability and environmental performance; and affinity for cloud-native architectures.

First, getting greater value from data is key for enterprises when looking at cloud providers. While many enterprises have moved from on-premises to public cloud or hybrid cloud, they are still struggling to effectively extract value from their organizational data, either because it is trapped in silos or too unstructured for effective aggregation. Google Cloud comes equipped with a vast arsenal of advanced data analytics and machine learning tools, notably BigQuery, a highly

scalable, multicloud data warehouse enabling real-time, predictive analytics for business users across vast data spaces. GCP also brings integrated platforms for data scientists (Vertex) and machine learning modelers (Auto-ML), conversational AI tools such as Dialogflow, translation and video AI tools, and low-code applications such as Appsheets for the budding citizen developers.

Ecosystem providers build on these native data and ML tools in many ways. In some cases, providers create custom point solutions for clients to address a specific business need, for example, a customer marketing platform using geo-spatial data from Google Maps, or a visual inspection tool for a manufacturing plant. Some providers are using the Google-native tooling to help enterprises bring stronger governance and searchability to their organizational data, for example by moving beyond traditional data warehouses and

data lakes to the creation of organization-wide data meshes that allow domain-driven searching by individual business functions. Other providers are helping integrate the Google tools with external, third-party data sources. Many providers offer data advisory and assessment services to provide assistance with data-maturity benchmarking and assessment, data strategy and roadmap creation, and data-estate modernization. No matter what the model is, the core goal is to enable enterprises to extract greater value from their data.

The second core strength of GCP is its importance in helping organizations achieve their sustainability goals. Following the COP26 Climate Agreement in late 2021, the achievement of net-zero carbon emissions targets by 2030 has become the paramount sustainability goal for many large enterprises worldwide. Providers told us that environmental

performance has, over the past year, become a key consideration for enterprises looking to migrate from on-premises data centers to the public cloud. Despite massive increases in computing power, hyperscalers' data centers have achieved remarkable improvements in energy efficiency over the past decade, and Google Cloud, in particular, stands out for its carbon-neutral data centers and its commitment to sustainable computing. More broadly, the Google Cloud offerings and toolset play a key role in helping enterprises and industries achieve their broader sustainability goals. Providers can harness Google's data and machine learning tools, for example, to help with solutions such as more accurate carbon accounting, optimization of cloud usage to lower carbon footprints, better measurement of ESG performance, optimization of manufacturing processes to reduce energy and materials consumption, or improved monitoring of



Executive Summary

sprawling supply chains. Providers are also creating workspace solutions to support remote and hybrid working, which again has a beneficial environmental impact through reduced travel.

The third core strength of GCP lies in its strong alignment with cloud-native technologies and ways of working. While containerized applications and Kubernetes orchestration platforms can be deployed across any public cloud, GCP is particularly suitable for such environments because of its highly scalable and composable architecture, its rich range of cloud-native tools, and its pioneering role in cloud-native operations and the development of site-reliability engineering principles. Google Anthos provides a unique platform for enterprises that wish to use the Google-native tooling across different hyperscaler environments. Ecosystem partners offer a range of implementation and integration services

for GCP, from the basic lift-and-shift approach to full-scale modernization on the platform. The GSIs also typically offer a range of managed services, encompassing services such as multicloud management, operations support, observability, security, FinOps, reporting, predictive analytics, cloud automation and cluster provisioning.

The Google ecosystem continues to evolve rapidly, growing in scale, depth and complexity. ISG has identified several key trends shaping this still-emerging ecosystem:

First, we are seeing the emergence of Google-native industry clouds. Although these are not yet at the level of development of the Microsoft industry clouds initiative, providers are beginning to craft Google-native industry clouds in sectors such as banking, financial services and insurance (BFSI); healthcare and life sciences (HCL); retail; manufacturing;

communications; utilities and others.

Second, ecosystem providers are using Google's AI/ML capabilities to create very targeted, persona-driven services and solutions. These solutions include CFO data analytics solutions that provide forecasting of cash flow or other financial metrics, or CMO analytics offerings that provide insights into customer behavior or enable the optimization of marketing spend across different social media channels.

Third, the Google ecosystem is helping democratize access to powerful ML-based technologies. As one DAML provider put it to us, "AI is no longer the preserve of the global tech giants." Previously, small and midsize enterprises could only look and marvel at the AI-based recommender engines of companies such as Netflix and Amazon that had the compute resources to train such engines on vast quantities of data. With the emergence of Google's

low-cost, cloud-based AI tools, nearly every enterprise can now access similar ML capabilities.

Fourth, providers are harnessing the DAML capabilities of Google Cloud to help enterprises craft new data architectures. The goal is better and faster access to data for different business users across an organization. In particular, we are seeing a move beyond centralized data lake architectures to cutting-edge data mesh constructs, in which data remains distributed across an organization in its own databases but is accessed through domain-driven machine learning capabilities. Different business users define and own the relevant domain, for example, financial data for finance users or customer data for marketing analysts, which then makes the relevant data discoverable and searchable.



Executive Summary

Finally, the massive shift toward remote and hybrid working has given significant impetus to Google Workspace, Google's suite of workforce communication and productivity tools. Although still relatively nascent compared to other platforms, Workspace is gaining traction due to its collaborative equity; it provides consistent performance across different devices, works equally well in remote versus office environments, has low training requirements and makes most features available to users independently of the licensing level.

Environmental performance has become a key consideration for enterprises looking to migrate from on-premises data centers to the public cloud



Provider Positioning

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



Provider Positioning

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	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Deloitte	Not In	Not In	Not In	Product Challenger	Not In
Devoteam G Cloud	Product Challenger	Not In	Product Challenger	Contender	Contender
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
GFT	Not In	Leader	Not In	Not In	Not In
Go Reply	Product Challenger	Contender	Not In	Not In	Not In
Grid Dynamics	Contender	Not In	Not In	Not In	Not In
HCL	Leader	Leader	Leader	Product Challenger	Product Challenger
IBM	Leader	Leader	Leader	Leader	Not In



Provider Positioning

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	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Infosys	Leader	Leader	Leader	Product Challenger	Product Challenger
Kyndryl	Contender	Not In	Not In	Not In	Not In
LTI	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
Mindtree	Product Challenger	Contender	Product Challenger	Not In	Not In
Netpremacy	Not In	Not In	Not In	Not In	Product Challenger
Oxya	Not In	Not In	Not In	Contender	Not In
Persistent Systems	Contender	Not In	Not In	Not In	Not In
Quantiphi	Not In	Leader	Not In	Not In	Not In
Rackspace Technology	Rising Star ★	Not In	Rising Star ★	Product Challenger	Not In
Softserve	Not In	Product Challenger	Not In	Not In	Not In



 Provider Positioning

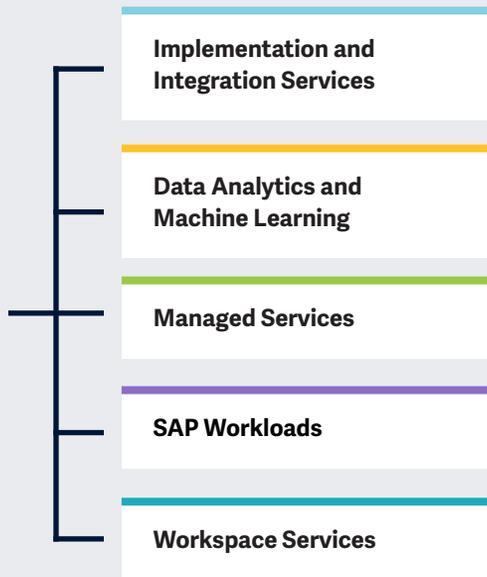
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	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Sopra Steria	Contender	Not In	Market Challenger	Not In	Not In
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Product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



A study on five key dimensions of the emergent Google Cloud ecosystem

Simplified Illustration Source: 2022



Definition

Google Cloud has become one of the most prominent cloud and technology providers in the world. The technology giant's capabilities and services have evolved rapidly in recent years, with Google Cloud underpinning the data workloads and applications of many of the world's leading enterprises. Google Cloud has significantly advanced application modernization through its creation of the open-source Kubernetes platform. It has also pioneered many developments, tools, and assets in data analytics and machine learning. Despite these advances, many enterprises still struggle to fully integrate the Google Cloud suite of technologies and capitalize on the rich native tooling and features of the platform. They therefore turn to the surrounding Google ecosystem, a complex community of global system integrators (GSIs), IT managed service and consulting providers, and ISVs, for help

in many areas. These include migration and implementation; making better use of the native tools of the platform; licensing and cost management; developing expertise and skills; machine learning; and citizen developer initiatives. They are mainly seeking partners that can innovate atop the platform and help drive their IT and business transformation. Enterprises that are taking an AI-driven innovation route to pivot to digital are naturally gravitating to Google as one of the key hyperscaler platforms, given its proven prowess in the AI technologies and algorithms space. They refer service providers that have demonstrated capabilities in development, test and run services for Google Cloud Platform (GCP), and in AI/machine learning and big data applications in businesses. They are also looking for providers with a strong track record in delivery, and the ability to provide quality talent and trained and GCP certified employees.



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

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

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

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

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

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following 5 quadrants: Implementation and Integration Services, Data Analytics & Machine Learning,

Managed Services for Google Cloud, SAP Workloads and Google Workspace Services.

This ISG Provider Lens™ study offers IT decision makers:

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

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

Provider Classifications

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



Midmarket: Companies with 100 to 4,999 employees or revenues between US\$20 million and US\$999 million with central headquarters in the respective country, usually privately owned.

Large Accounts: Multinational companies with more than 5,000 employees or revenue above US\$1 billion, with activities worldwide and globally distributed decision-making structures.

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

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





Data Analytics and Machine Learning

Who Should Read This

This report is relevant to enterprises across industries in Europe for evaluating providers of data analytics and machine learning services. In this quadrant, ISG highlights the current market positioning of providers in Europe and how they can address the key challenges faced by enterprises. Our assessment is based on the depth and breadth of providers' service offerings and market presence.

Customers focus more on monetization now, and the data marketplace helps them connect with the partner ecosystem to monetize data. This is gaining traction in different industry verticals, such as retail, consumer packaged goods, energy, airlines and healthcare. 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 machine learning and a top-notch talent ecosystem and delivery ecosystem across the globe.



IT leaders should read this report to understand the relative positioning and capabilities of partners that will help them effectively consume services from Google Cloud and understand how these providers' technical capabilities are compared with the rest of the market.



Software development and technology leaders should read this report to understand the positioning of managed service providers and how the providers' offerings can impact an enterprise's ongoing transformation initiatives, while identifying the benefits of moving to the cloud.



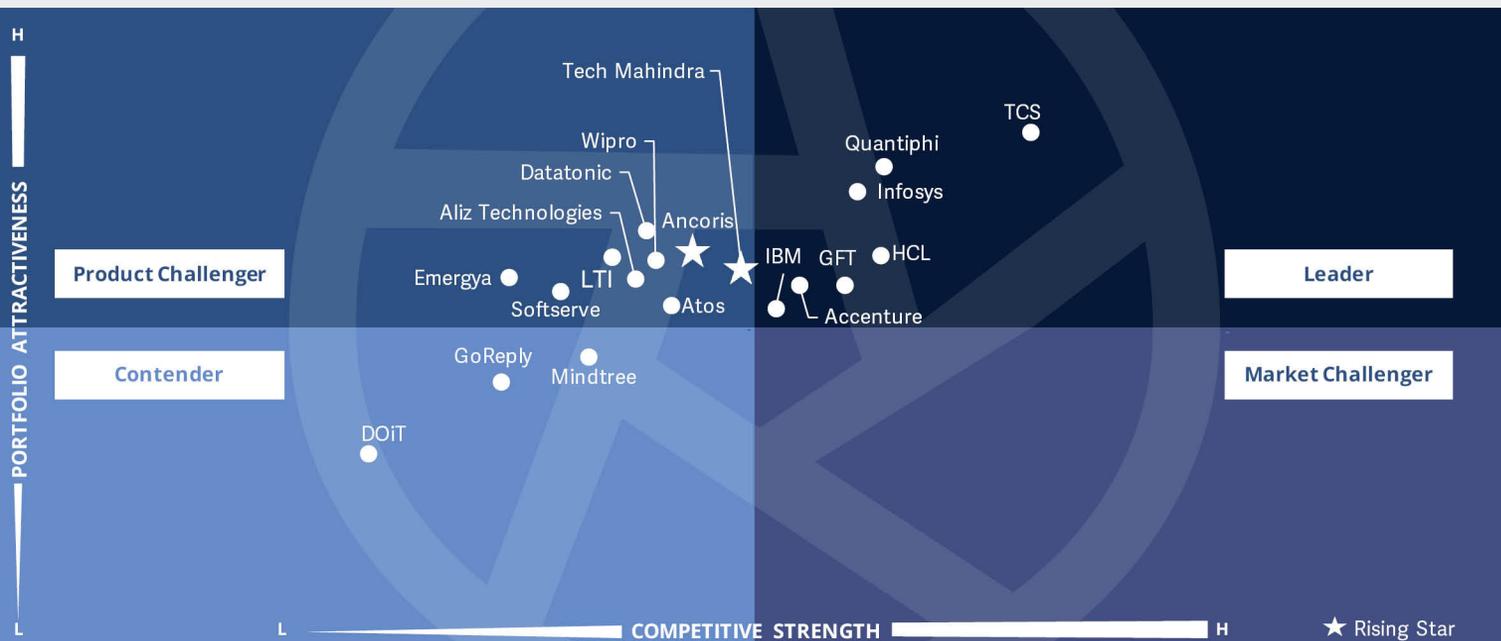
Digital leaders should read this report to understand the provider ecosystem for Google Cloud data analytics and machine learning services in Europe and gain knowledge about how providers compare to one another.



ISG Provider Lens™
 Google Cloud Partner Ecosystem
 Data Analytics and Machine Learning

Source: ISG RESEARCH

Europe 2022



This quadrant assesses service providers that offer data analytics and machine learning solutions on Google Cloud. Service providers are **helping enterprises with data modernization, governance and ML capabilities.**

Mark Purdy



Definition

This quadrant includes providers that showcase strongly differentiated capabilities in leveraging big data technologies and machine learning, especially in bleeding-edge deep learning algorithms and API libraries available and accessible through GCP. These include Tensorflow, Dialogflow, Kubeflow, BERT, GLaM, MURAL applications, federated learning algorithms, Vertex AI, AutoML, responsible and explainable AI, computer vision, augmented reality, virtual reality, extended reality applications and IoT. In addition, foundational capabilities in big data and machine learning on GCP using CloudSQL, Cloud Dataproc, BigQuery, Cloud Datalab and Datastore, running and developing solutions/services on the migrated workloads from MySQL and Hadoop/Spark/Hive in GCP should be demonstrated at scale.

Eligibility criteria:

1. Scope and use of **relevant tools and technologies**
2. **Holistic DAML services and solutions** integration and innovation capabilities and offerings
3. Scope and availability of **enabling practices and programs for talent and skills upgrades** to ensure customer success (for example, consulting/best practice frameworks, ROI and business case development)
4. Availability, **experience and certifications of resources** and competencies in the GCP
5. **GCP-focused offerings, roadmap and innovations** (current and planned)
6. Number and reputation of **references** with regard to DAML services and solutions on GCP
7. **Pricing models and partner/channel relationships**

DAML-related tech stacks



Observations

Data and machine learning are the lifeblood of Google Cloud. In moving workloads to Google Cloud, enterprises are typically seeking to liberate data within their organizations and use it to drive better decision-making and greater business value. Google Cloud is tailor made for such applications, given its highly extensible and composable nature, as well as its impressive range of DAML native tooling. We are seeing increased interest in new data architectures such as data mesh, as organizations move away from traditional data warehouses and data lakes. Providers are developing a wide range of industry and point solutions using Google Cloud's DAML features, such as use cases for computer vision or conversational AI. Providers are also developing persona-based analytical tools, for example for chief financial officers, chief marketing officers or chief

sustainability officers within enterprises. Another important trend is data sharing through Google's Data Marketplace, which makes it possible for enterprises to share and access data on topics as diverse as COVID-19, bio-medical literature, bitcoin and crime trends in Chicago. Enterprises are also paying greater attention to data and AI governance, for example, through tools that help trace the provenance of data and assess its quality and integrity at various stages of use.

From 39 companies assessed for this study, 19 have qualified for this quadrant, with seven being Leaders and two Rising Stars.



Accenture is leading with its Data Modernization Solution designed to help enterprise clients exploit the native capabilities of Google's BigQuery features, as well as targeting the intelligent

marketing sector through its customer data architecture, providing a 360-degree view of the customer.

GFT

GFT is a global digital technology services company that won Google Cloud Breakthrough Partner of the Year for EMEA in 2019. GFT has specialism in computer vision technology and a strong R&D focus through two CoEs for data and machine learning in Europe.

HCL

HCL offers data and machine learning solutions on Google Cloud, with strong point solutions in areas such sustainable supply chains and real-time inventory and compliance. It has considerable depth of talent in data and analytics on GCP in Europe and has carried out projects for many European and global enterprises.

IBM

IBM invests heavily in a range of machine learning and data applications that can be used on Google Cloud, including conversational AI and process mining. It is also making a strong play with its IBM Data Stage out-of-the-box solution for data analytics on Google Cloud and other public clouds.

Infosys

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



Data Analytics and Machine Learning

quantiphi

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



TCS, a 2020 Google Cloud Breakthrough Partner of the Year, offers a wide range of data modernization, data analytics and machine learning solutions on Google Cloud. It has considerable experience implementing data and machine learning solutions for a range of major global brands in Europe and beyond.

Ancoris

Ancoris, a UK-based Google Cloud pure play provider, stands out for its range of persona-based data analytics and machine learning solutions targeting the needs of business users such as chief marketing officers and chief financial officers. Its data modernization and AI solutions have been implemented for a range of U.K. and European clients.



Tech Mahindra, a Rising Star in this year's report, offers a range of industry and point data and analytics solutions on Google Cloud, such as AI-powered vendor selection and AI-based legal assistance. Its focus on IoT data solutions also offers a key point of differentiation.





“Strong visual inspection capabilities make GFT a Leader in this quadrant.”

Mark Purdy

GFT

Overview

Founded in 1987, GFT is a digital technology and IT services company operating in 16 markets in Europe, Asia and the Americas. Headquartered in Stuttgart, it has around 9,000 employees worldwide. GFT has three specializations: Application Development, Data Analytics and Security. In 2019, it was the Google Cloud Breakthrough Partner of the Year for EMEA. GFT’s DAML services are growing in Europe, where it also has a significant base of analytics and machine learning experts.

Strengths

Strong on visuals: GFT has strong expertise in computer vision technologies and is listed as one of the four global service providers for GCP’s Visual Inspection AI. GFT offers a range of advanced visual inspection tools for manufacturing processes. These solutions include process monitoring (for example, capturing temperature data); use of vision AI to identify product defects; in-line quality forecasting to reduce the need for rework and final testing; and analysis of final packaging video streams.

Industry traction: GFT has carried out data modernization and analytics projects for blue-chip clients in Europe and beyond, including implementing a data migration to GCP for a tier-1 global bank and creating a blockchain-based payments solution for a leading UK bank.

R&D focus: Aside from the data practice in each country, GFT also has two CoEs for data and machine learning, one in the U.K. (focusing on digital innovation in financial services) and the other in Spain (focusing on cutting-edge research into industry solutions based on IoT, blockchain, and AI).

Caution

Given that it may be less well known in Europe, GFT should consider ramping up its marketing and thought leadership efforts in the region by better showcasing its data analytics and machine learning capabilities and client success stories.





Appendix

The ISG Provider Lens 2022 – Google Cloud Partner Ecosystem 2022 analyzes the relevant software vendors/service providers in the Europe 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 programmes, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of April 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in US 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. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * Technology advancements



Author & Editor Biographies

Lead Author



Mark Purdy
Principal Analyst

Mark Purdy is a Principal Analyst at ISG Provider Lens™ and brings over 25 years of experience working on economics and technology research in business and government. Mark has a focus on next-generation technologies, especially artificial intelligence and intelligent automation, digital twins, digital olfaction, machine learning, virtual reality, and edge computing. He is the author of several ISG Provider Lens™ studies, including the 2021 Container Solutions and Services study for Europe, and the 2021 Intelligent Automation studies for the UK and the

Nordics. He has published widely in tier-1 media and business publications such as Harvard Business Review and Sloan Management Review. He speaks on economics and technology issues at conferences, client workshops and seminars around the world.

Research Analyst



Srinivasan PN
Senior Research Analyst

Srinivasan PN is a senior research analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on AWS & Google Ecosystem, Digital Engineering, Manufacturing and Mainframe. His area of expertise lies in the space of engineering services and digital transformation. Srinivasan comes with 8 years of experience in the technology research industry and in his prior role, he carried out research delivery for both primary and secondary research

capabilities. Srinivasan also authors enterprise context reports and global summary reports for each of his expertise areas. Along with this, he supports the advisors with his research skills and writes papers about latest market developments in the industry.





IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analysing 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](#).

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



JUNE 2022

REPORT: GOOGLE CLOUD PARTNER ECOSYSTEM