ISG Provider Lens™

Google Cloud Partner Ecosystem

A research report comparing strengths and advantages of Google Cloud partners

Customized report courtesy of:

genpact

QUADRANT REPORT | JUNE 2024 | U.S.

Table of Contents

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Google Cloud ecosystem spearheads advancements in data governance, AI and digital transformation

Google Cloud adoption in the U.S. market, especially in big data and AI infrastructure, has witnessed significant momentum and evolution in recent years. Enterprises increasingly recognize Google Cloud's unique value proposition and competitive advantages, driving adoption trends across industries.

One notable trend was the increasing preference for multicloud and hybrid cloud strategies, with organizations leveraging Google Cloud and other cloud providers to optimize performance, resilience and cost-efficiency, especially in the big data and AI space, while mitigating hyperscaler lock-in risks. The adoption and utilization of platforms and tech stacks such as Google Cloud Anthos and Apigee across the broad spectrum of technologies have witnessed significant growth in the past 1-2 years in the U.S. market.

Another key driver of Google Cloud adoption was the accelerating pace of digital transformation initiatives, fueled by the imperative to modernize legacy systems, enhance agility, and rapidly deliver innovative products and services to the market. Enterprises across sectors such as healthcare, finance, retail and manufacturing have increasingly embraced Google Cloud's comprehensive suite of cloud services to drive operational efficiency, scale dynamically and harness advanced capabilities such as AI, ML and data analytics to gain deeper insights and drive informed decision-making.

Google Cloud's strategic partnerships and ecosystem collaborations with leading technology vendors, startups, traditional service providers and system integrators played a pivotal role in driving adoption by offering tailored solutions, domain expertise and go-to-market support to address diverse businesses' unique needs and challenges.

Additionally, the heightened focus on security, compliance and data governance emerged as critical factors influencing Google Cloud adoption, with organizations prioritizing trust,

Partner expertise fuels Google Cloud adoption through big data infrastructure and GenAI.

transparency and regulatory compliance in their cloud deployments. Google Cloud's robust security posture, advanced encryption and comprehensive compliance certifications positioned it as a trusted partner for businesses seeking to safeguard their sensitive data and intellectual property in the cloud. Furthermore, the democratization of cloud-native technologies and development tools, coupled with Google Cloud's commitment to open standards and interoperability, has empowered developers, data scientists and IT teams to innovate rapidly and collaborate seamlessly across the entire software development lifecycle.

Moving forward, Google Cloud's continued investments in infrastructure expansion, product innovation and customer success initiatives are expected to further accelerate adoption and fuel ongoing growth in the U.S. market. Such investments enable organizations to unlock new opportunities, drive competitive differentiation and achieve their strategic business objectives in the dynamic and hyperconnected digital landscape of the future.

Considering these trends in the demand-side strategic levers regarding Google Cloud adoption by large end-user enterprises in the U.S., prominent IT service providers partnering with Google Cloud in the U.S. market have made significant progress, thereby shaping the cloud services and digital transformation landscape. Key players unveiled comprehensive Google Cloud consulting and implementation services, focusing on seamless migration, optimization and innovation for businesses utilizing Google Cloud's advanced capabilities. Google Cloud has fortified its partnerships with providers having in-depth regulatory expertise, which, in turn, has resulted in the introduction of tailored solutions for SAP migration and management. This initiative enables enterprises to streamline operations and enhance performance on Google Cloud. Tech services giants have also worked on breakthroughs in building secure and robust data infrastructure on Google Cloud, emphasizing data protection, compliance and resilience, thereby catering to the evolving needs of enterprises for data-centric solutions. Such initiatives have collectively underscored the commitment of leading IT service providers to drive innovation, deliver value-added services on Google Cloud, and propel businesses toward digital transformation and sustainable growth in the dynamic landscape of cloud computing.

Leading players within the Google Cloud ecosystem have introduced domain and industry-specific consulting and implementation services tailored to Google Cloud's capabilities. These capabilities are aimed at guiding businesses through the complexities of cloud migration, optimization and innovation. Specialized solutions, integrated tech stacks, knowledge packs, accelerators and prebuilt tool stacks were introduced to streamline the migration, management, and optimization of enterprise big data and analytics workloads on Google Cloud. This approach enables organizations to harness the full potential of enterprise applications in a scalable and cost-effective manner.

Google Cloud's secure and robust data infrastructure harnesses advanced technologies such as encryption, data masking and AI-driven threat detection to ensure data integrity, confidentiality and availability in the cloud, addressing critical concerns around data security and compliance. Highly regulated industries explore a dedicated cloud environment built on the Google Cloud infrastructure. This environment is designed to meet stringent regulatory requirements, support data sovereignty, and expand Google Cloud's accessibility and adoption within these sectors. These trends collectively underscore the evolving dynamics of the Google Cloud ecosystem, with leading IT service providers driving innovation, collaboration and value creation to empower businesses across industries to thrive in the digital age.

Google Cloud has emerged as a leader in data governance and secure big data infrastructure, offering enterprises a robust and scalable platform to manage and analyze their data with compliance. With a comprehensive suite of data governance tools and services, Google Cloud empowers organizations to establish and enforce policies, controls and access management mechanisms to protect sensitive information and ensure regulatory compliance across the data lifecycle. By utilizing advanced encryption, key management, and identity

and access management (IAM) capabilities, Google Cloud provides a secure foundation for building and operating data lakes tailored to the unique needs of various industries, from healthcare and finance to manufacturing and retail. These industry-specific data lakes enable organizations to aggregate, store and analyze vast amounts of structured and unstructured data from disparate sources, empowering them to derive actionable insights, drive innovation and gain competitive advantage in the data-driven economy.

Generative AI (GenAI) tech stacks and algorithms, originating from Google labs, such as BERT and its specific follow-through versions of transformer models, have advanced further and are integrated into platforms such as Gemini, Bard, Duet AI and Vertex AI. This advancement has ushered in a new era of creativity and innovation across various industries in the U.S. market. Gemini, a revolutionary platform, embodies the pinnacle of GenAI, enabling users to seamlessly generate high-fidelity, photorealistic images from textual descriptions, thereby revolutionizing the creative process for designers, marketers and content creators. Bard represents the vanguard of AI-powered content generation, utilizing advanced NLP algorithms to craft compelling narratives and interactive experiences that captivate audiences across mediums such as literature, gaming and virtual reality. Duet AI has emerged as a game-changer from coding support and generation to customer service, virtual assistance and personalized user experiences, empowering businesses to enhance engagement, streamline operations, and drive satisfaction for developers and users and elevating them to higher levels.

These transformative Google Cloud technologies have found widespread early adoption, experimentation and acclaim in the U.S. market, offering tangible benefits and unlocking new opportunities for innovation and growth across diverse sectors, from entertainment and advertising to healthcare and finance. As GenAI continues to evolve and mature, fueled by ongoing advancements in ML and neural network architectures, its impact on society, businesses and the economy is poised to deepen, reshaping the manner in which organizations work, create, communicate and interact in the digital enterprise era.

In the U.S., Google Cloud services have gained significant momentum, driven by factors such as the increasing adoption of multicloud strategies, accelerating digital transformation initiatives, increasing strategic partnerships and focus on security and compliance, democratizing cloud-native technologies, and continuing investments in infrastructure and innovation.

Provider Positioning

Page 1 of 3

	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
66Degrees	Product Challenger	Product Challenger	Product Challenger	Not In	Product Challenger
Accenture	Leader	Leader	Leader	Leader	Leader
Ancoris	Contender	Product Challenger	Product Challenger	Not In	Product Challenger
Capgemini	Leader	Leader	Leader	Leader	Leader
Cognizant	Leader	Leader	Leader	Leader	Leader
Deloitte	Market Challenger	Market Challenger	Market Challenger	Leader	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	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
Eviden (Atos)	Rising Star ★	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Fractal Analytics	Not In	Rising Star ★	Not In	Not In	Not In

Provider Positioning

Page 2 of 3

	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Genpact	Leader	Leader	Not In	Not In	Not In
GFT	Product Challenger	Product Challenger	Not In	Not In	Not In
Grid Dynamics	Contender	Contender	Not In	Not In	Product Challenger
HCLTech	Leader	Leader	Leader	Leader	Rising Star ★
IBM	Market Challenger	Market Challenger	Market Challenger	Market Challenger	Not In
Infosys	Leader	Leader	Leader	Leader	Leader
Kyndryl	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
LTIMindtree	Leader	Leader	Leader	Rising Star ★	Leader
Mphasis	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
Onix	Not In	Product Challenger	Not In	Not In	Not In
Persistent Systems	Leader	Leader	Leader	Not In	Rising Star ★

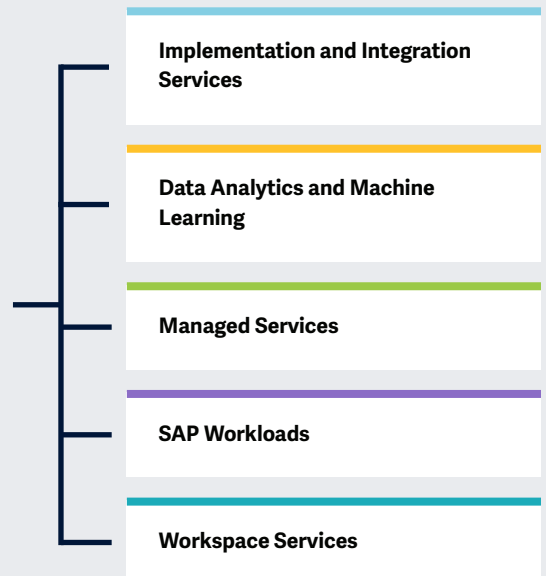
Provider Positioning

Page 3 of 3

	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Quantiphi	Leader	Leader	Rising Star ★	Product Challenger	Not In
Rackspace Technology	Leader	Leader	Leader	Leader	Not In
SADA	Contender	Contender	Contender	Not In	Not In
Slalom	Contender	Contender	Not In	Not In	Not In
Softserve	Not In	Product Challenger	Not In	Not In	Not In
TCS	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Leader	Rising Star ★	Not In
T-Systems	Product Challenger	Not In	Product Challenger	Product Challenger	Not In
VVDN Technologies	Not In	Not In	Product Challenger	Not In	Not In
Wipro	Leader	Leader	Leader	Leader	Leader
Woolpert Digital Innovations	Product Challenger	Contender	Not In	Not In	Contender

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

Simplified Illustration Source: ISG 2024



Definition

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

With these deep technical advances, many enterprises struggle to fully integrate and capitalize on the Google Cloud suite of technologies. They, therefore, seek assistance from the ecosystem surrounding Google Cloud, a community of global systems integrators (GSIs), IT managed service and consulting providers and ISVs. These providers have many capabilities and specializations, including migration and implementation, licensing and cost management, governance and security, application development, ML, automation and citizen development.

Given Google Cloud's proven expertise in AI technologies and algorithms, enterprises prefer service providers with demonstrated capabilities in developing, testing and running ML and big data applications on the platform. Other Selection Criteria include a strong delivery track record and the ability to provide quality talent and staff certified in Google Cloud, especially on fast-emergent practices and platforms like large language models (LLMs), prompt engineering and Gemini. Enterprises also look for providers to help develop new industry use cases, implement collaborative and productive hybrid work models and develop effective tools and systems to meet environmental, social and governance (ESG) goals.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following five quadrants for services/solutions: Implementation and Integration Services, Data Analytics and Machine Learning, Managed Services, SAP Workloads and Workspace Services.

This ISG Provider Lens™ study offers IT-decision makers:

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

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

Provider Classifications

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

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

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

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

Provider Classifications: Quadrant Key

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

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Implementation and Integration Services

Who Should Read This Section

This report is relevant to enterprises across the U.S., focusing on assessing implementation and integration service providers' capabilities to build and migrate services in hybrid and multicloud environments. Enterprises increasingly opt for a multicloud strategy to diversify their services across multiple cloud providers. Organizations pursue this approach for various reasons, such as maintaining legal compliance, offering cost-effectiveness, implementing cybersecurity measures and mitigating the risk of system failures to reduce redundancy.

Enterprises collaborate with service providers that offer comprehensive implementation capabilities, including hybrid and multicloud setups. These providers prioritize robust security measures for applications and infrastructure. Providers must demonstrate high-quality talent, global delivery capabilities and a customized pricing model to be a preferred partner. Consulting services related to architectural design and performance optimization have observed an upward trend.

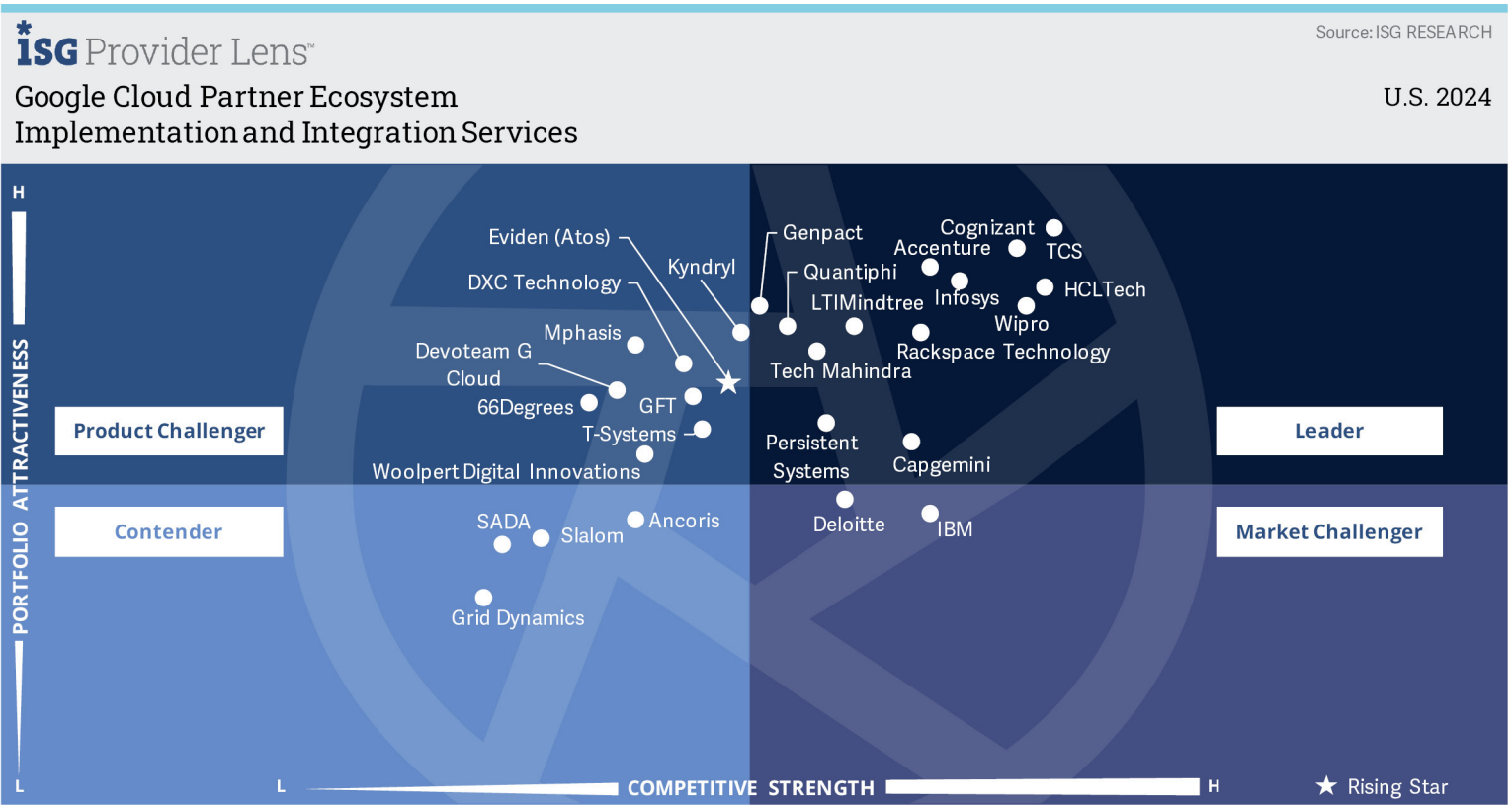
Leading providers are incorporating strong sustainability and environmental, social and governance (ESG) features into their Google Cloud architectures, including initiatives such as green clouds and tools for tracking carbon footprints. Enterprises increasingly adopt serverless tools, such as Cloud Functions, Cloud Dataflow and Cloud Run, to build scalable, event-driven applications and services on Google Cloud.

GenAI has transformed software development by enhancing data accessibility, comprehending data from diverse sources, and automating critical tasks such as data cleansing, structuring and managing. Moreover, GenAI efficiently updates legacy codes, facilitating seamless migration to the cloud.

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

Digital professionals should read this report to grasp the positioning of Google Cloud implementation and integration service providers and evaluate their impact on clients' ongoing transformation initiatives.

Procurement professionals should read this report to understand the capabilities of Google Cloud implementation and integration service providers in the U.S. and their competitive advantages.



This quadrant assesses service providers that assist enterprises with **Google Cloud implementation, migration and multicloud integration**. Service providers included in the assessment **focus on modernizing business applications.**

Tapati Bandopadhyay

Definition

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

Eligibility Criteria

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

Observations

Service providers are developing robust tools, assets and accelerators that meticulously analyze existing workloads within organizations. These assets identify patterns, dependencies and resource utilization and provide crucial insights for a smooth transition to Google Cloud. Advisory services on architecture design and performance tuning have been on the rise to guide organizations through their migration journey.

GenAI empowering developers across the software development lifecycle: GenAI has significantly reduced the complexity of migrating workloads to the cloud. By utilizing GenAI models, enterprises have been automating tasks such as data transformation, application refactoring and infrastructure provisioning. Gemini Code Assist empowers developers by accelerating the development process while improving code quality and security.

Navigating cloud cost optimization and data security challenges: Service providers employ analytical FinOps tools and frameworks. They adopt SRE practices and regional delivery models for cost optimization. Enterprises, especially those in highly regulated industries, remain cautious about the location and security of their data on public clouds.

Empowering organizations with industry-specific solutions: Google Cloud recognizes the importance of catering to specific industry needs. It has developed a suite of industry-specific solutions that address unique use cases, mainly targeting retail, financial services, manufacturing, telecommunications, media and entertainment, healthcare and life sciences, education, government, supply chain and logistics to provide differentiated solutions.

From the 33 companies assessed for this study, 28 qualified for this quadrant, with 13 being Leaders and one a Rising Star.

accenture

Accenture specializes in migrating and optimizing multicloud and hybrid environments with Google Cloud. It earned the title of Global Services Partner of the Year in 2023 and was named Public Sector Partner of the Year — U.S. Federal, Department of Defense.

Capgemini

Capgemini secured the Google Cloud Global Industry Solution Partner of the Year award for GenAI services in April 2024. It delivered over 250 GenAI use cases in six months to address industry-specific challenges and enhance standard business processes.

cognizant

Cognizant innovates by offering enterprises with Cloud Steps Framework for migrations, Upshift for application transformation blueprints and cloud-native code development acceleration, and Intelligent Data Works to accelerate data workloads migration to Google Cloud.

genpact

Genpact advanced from a Product Challenger to a Leader by expanding its service portfolio and utilizing the Google Cloud stack to deliver enterprise platform solutions. It prioritizes AI transformation to achieve 30 percent revenue from applied AI solutions.

HCLTech

HCLTech has increased its focus on Google Cloud, particularly in cloud readiness and sustainability assessment, Anthos multicloud management, advanced application deployment (including Apigee and Kubernetes), containerization and traditional application modernization.

Infosys

Infosys adopts a customer-centric approach and closely collaborates with clients to accelerate digital transformation. In 2024, it secured the Application Development Partner award for designing differentiated cloud-native applications using Google Cloud services.

LTIMindtree

LTIMindtree's implementation approach considers migration complexities and incumbent partner dependencies. Its expanding portfolio comprises application migration and modernization, outsourced product development and engineering, and platform modernization and engineering.

Persistent

Persistent Systems has developed services that align with Google Cloud's offerings. An example is the IP-driven application and database modernization accelerator that utilizes Google Cloud's GenAI capabilities to enhance data modernization and expedite code migration.

quantiphi
Solving What Matters

Quantiphi has expanded its strategic partnership with Google Cloud, enabling clients to accelerate their digital transformation and adopt Google Cloud infrastructure and solutions. Its platforms on Google Marketplace include baioniq, sQrutinizer and Dociphi.

rackspace technology.

Rackspace Technology partnered with Google Professional Services to launch Accelerated Cloud Migration (ACM) to expedite the cloud migration process. Google has also invested $13 million toward establishing a Rackspace Google COE.

TCS TATA CONSULTANCY SERVICES

TCS, as a transformation partner, has introduced a wide range of use cases and solutions that are already integrated into client environments. These solutions include TCS BaNCS™, TCS Optumera™, TCS OmniStore™ and TCS Dexam™.

Tech Mahindra

Tech Mahindra has a Premier Partner status and co-creates and co-brands enterprise-grade solutions with Google Cloud. Its implementation and integration services approach comprises database modernization, application and infrastructure, and automation and optimization.

Wipro focuses on building IPs, accelerators, and horizontal and industry-focused offerings. Integrating acquired organizations such as Capco, Edgile and Ampion exemplifies the dedication to technological innovation to shape the One Wipro customer proposition.

EVIDEN

Eviden (Rising Star) offers comprehensive infrastructure and application modernization services, which include providing support for in-depth analysis, technical guidance, and implementation of a seamless and efficient modernization process for its clients.

Leader

"Genpact leverages a combination of domain expertise, agile operational methodologies and digital capabilities to deliver value-driven migration and modernization outcomes on Google Cloud."

Tapati Bandopadhyay

Genpact

Overview

Genpact is headquartered in New York, U.S. It has more than 125,000 employees across 80 offices in 30 countries. In FY23 the company generated $4.5 billion in revenue, with Digital Operations as its largest segment. The company focuses on data, technology and AI, which contributes to approximately 44 percent of its annual revenue. Its strategic partnership with Google Cloud enables it to develop and deploy GenAI capabilities rapidly and responsibly, especially in key industries such as consumer goods, life sciences, retail, healthcare, hi-tech and financial services. In 2023, 209 company resources obtained GenAI certifications and earned 23 GenAI skill badges.

Strengths

Expanding talent base and certifications: Considering the shortage of skilled Google Cloud resource base in the market, Genpact has a competitive advantage based on its Google Cloud talent development initiatives. The company recorded an overall 400 percent increase in certifications in 2023. It continues to invest in upskilling its talent and recorded a hike of 5.7 percent in total resources trained in Google Cloud, reaching 1,221 in 2023 from 2022. It has been endowed as an early trusted tester partner for AI.

Key wins: Genpact recently secured significant clients for Google Cloud implementation and integration, with a key focus on finance data platform implementations. The company assisted a large cable communication firm in migrating over 1,000 applications to the cloud, specifically on Google Cloud, using containerization and Anthos orchestration.

GenAI focus: Genpact has applied GenAI for varied Google Cloud implementation and integration use cases, such as developing simulation twins, hypothesis testing and converting legacy SQL to modern SQL. Its major differentiator is the seamless GenAI integration with the software development lifecycle (SDLC), leveraging the technology, cloud and process (TCP) stack to accelerate time-to-market.

Caution

Genpact should develop a more robust perspective on the future implications of GenAI in implementation and integration. The company should also highlight additional success stories from its Google Cloud migration clients in the U.S. to strengthen its leadership position.

Data Analytics and Machine Learning

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating providers of data analytics and ML services on Google Cloud. In this quadrant, ISG emphasizes the present market positioning of these providers in the U.S. and outlines their strategies for tackling challenges encountered by enterprises within the region.

Enterprises increasingly demand efficient, extensive data management to process and analyze vast volumes of information generated by cloud services and solutions. Service providers are assisting enterprises in transitioning from traditional data lakes to AI-enabled data meshes and fabrics.

Enterprise clients partner with service providers with extensive data analytics and ML proficiency, a highly skilled talent pool and a global delivery ecosystem. Google Cloud collaborates with service providers to assist enterprises in understanding data, enabling informed decision-making.

Significant integration of GenAI capabilities into data analytics workflows has been observed. LLMs such as Bard and PaLM 2 facilitate data exploration, code generation and automated insights, democratizing access to advanced analytics. Service providers increasingly invest in robust data governance frameworks on Google Cloud, leveraging tools such as Data Catalog and Data Loss Prevention (DLP) to ensure compliance and security.

The demand for skilled data scientists and ML engineers will continue to outpace supply. Enterprises are investing in upskilling the existing talent to address this challenge. They are directed toward explainable AI tools that assist them in understanding model predictions, ensuring transparency and building trust in AI systems.

Technology professionals should read this report to understand providers' relative positioning and capabilities to effectively utilize Google Cloud data analytics and ML and assess their comparative position.

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

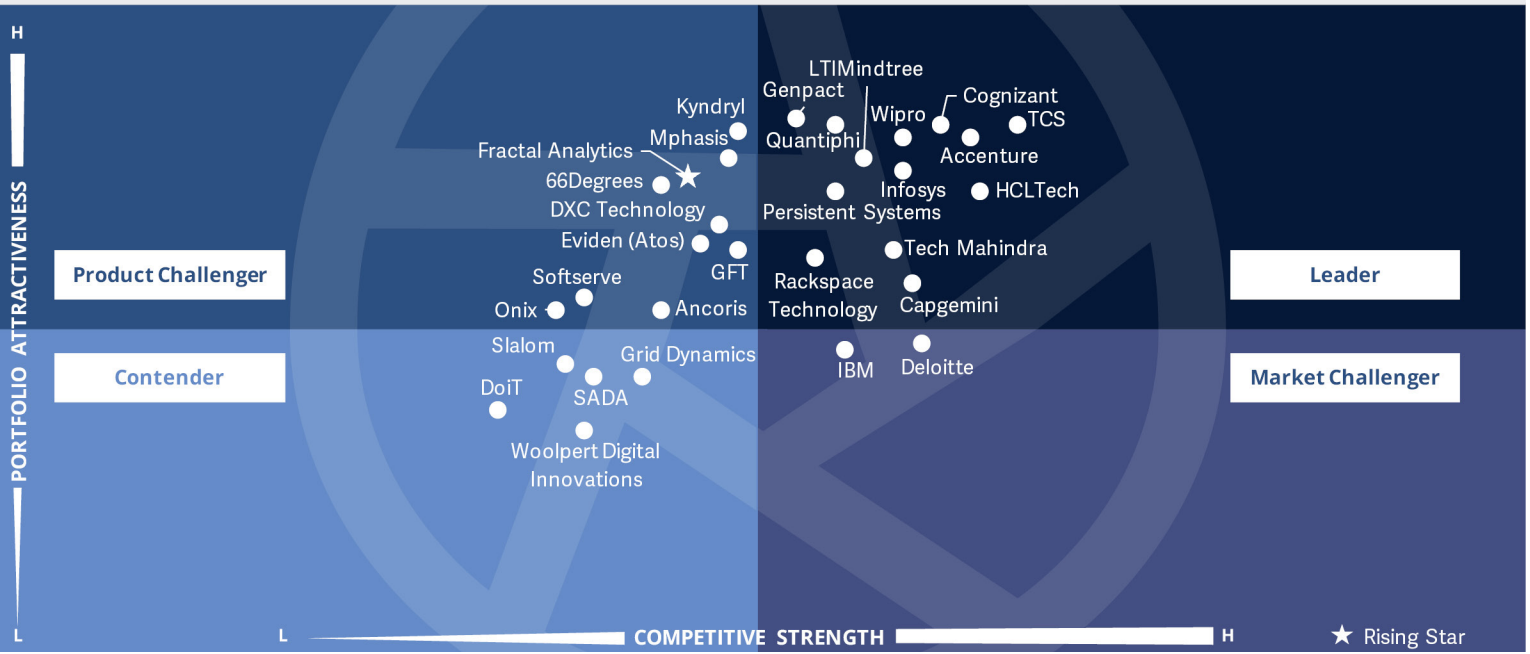
Procurement professionals should read this report to learn about providers offering Google Cloud data analytics and ML in the U.S. and understand their competitive advantages.

ISG Provider Lens™

Source: ISG RESEARCH

Google Cloud Partner Ecosystem
Data Analytics and Machine Learning

U.S. 2024



This quadrant evaluates service providers leveraging **Google Cloud data analytics and ML components** to offer U.S. enterprises with innovative solutions, including enterprise LLMs, analytics and GenAI.

Tapati Bandopadhyay

Definition

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

Capabilities around new data architectures, such as data meshes, are becoming crucial as organizations are moving away from legacy data warehouses and data lakes. Aligning with industry-leading innovations in the tech landscape, such as DALL·E 3, GPT-4 and the recent advancements in Google Gemini, Leaders in this quadrant are expected to develop a wide range of industry and point solutions using Google Cloud's DAML features. Some of these solutions include use cases for computer vision and combinations with conversational AI.

Eligibility Criteria

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

Observations

In the U.S., data analytics and ML on Google Cloud is a highly competitive segment within the Google ecosystem. Enterprises are actively pursuing data-driven insights to stay competitive. Service providers are offering next-generation tools to harness the full potential of the latest developments and offerings in BigQuery and GenAI. Recent advancements include multimodal and structured data embedding support in BigQuery, LLM fine-tuning and evaluation in BigQuery using Gemini 1.0 Pro and other models, and ML model monitoring capabilities. Enterprises emphasize the need for confidential computing, allowing sensitive data to be processed within secure enclaves.

Democratization of GenAI and wide adoption of responsible AI framework: Google Cloud and service providers focus on making GenAI accessible to a broader audience, mainly through user-friendly interfaces, low-code/no-code (LCNC) tools and pretrained models catering to specific needs. As concerns about bias and ethical implications grow, service providers in partnership with Google emphasize their commitment to responsible AI, integrating explainability and fairness tools into its AI and GenAI offerings.

AI-powered data management: AI and ML will be increasingly integrated into data management tasks, automating data quality checks, detecting anomalies and managing metadata, leading to more efficient data pipelines.

Serverless and edge analytics: Google Cloud and GSIs enhance serverless analytics capabilities, including Big Query's serverless architecture and Cloud Run. This approach supports accessible and more cost-effective data analysis. Additionally, edge computing and analytics will gain traction as demands for IoT and real-time data processing increase.

From the 33 companies assessed for this study, 30 qualified for this quadrant, with 13 being Leaders and one Rising Star.

accenture

Accenture excels in transforming data management and analytics through its Rapid Insights Lab, integrating AI to accelerate operational decisions and business insights.

Capgemini

Capgemini's services harness AI and GenAI, transforming enterprise data into crucial insights for competitive advantage and operational efficiency.

cognizant

Cognizant collaborates with Google Cloud to launch innovation hubs for responsible AI projects worldwide, including San Francisco.

genpact

Genpact's strength in data analytics and ML is demonstrated through the deployment of over 10,000 specialists globally. The company should focus on creating solutions that transform raw data into actionable BI across various industries.

HCLTech

HCLTech has impacted data analytics, AI and ML through innovative labs and a comprehensive model library with over 300 certified Google Cloud professionals. It has launched Google Cloud services such as AlloyDB and Serverless Spark, demonstrating its cutting-edge approach.

Infosys leverages AI and ML to transform data analytics and enhance enterprise operational efficiencies and revenue through advanced technology applications and workforce transformation insights.

LTIMindtree excels in data analytics and ML and employs platforms such as Eureka and GenAI to modernize data ecosystems and enhance decision-making with AI-driven insights.

Persistent Systems provides robust data and analytics solutions, integrating advanced tools such as Looker and Vertex AI while ensuring compliance and embedding data security. Its offerings are comprehensive, covering databases to AI and BI services on Google Cloud.

Quantiphi aligns with Google Cloud's security emphasis, expanding its AI-driven cybersecurity portfolio to enhance threat detection and response capabilities.

Rackspace Technology leverages in-depth technical expertise to accelerate data solution adoption. The company offers comprehensive services from database management to advanced AI and ML solutions.

TCS partners for AI and ML innovations, providing co-creation opportunities and proactive analytics services to enhance decision-making processes and operational efficiencies.

Tech Mahindra leverages Google Cloud's edge technology and 5G to lead in cloud adoption and network-centric solutions, enhancing data-driven enterprise strategies.

Wipro's strength in data analytics and AI is showcased by its innovative platforms such as Wipro's Data Intelligence Suite (WDIS) and sector-specific solutions, enhancing data-driven decision-making and operational efficiency on Google Cloud.

Fractal Analytics

Fractal Analytics (Rising Star) excels in delivering end-to-end data solutions on Google Cloud, from data warehousing and analytics to AI-driven decision systems, to enhance data-driven decision-making.

Leader

"Genpact is offering advanced Google Cloud data analytics, ML and GenAI services even in complex, highly regulated client industries."

Tapati Bandopadhyay

Genpact

Overview

Genpact is headquartered in New York, U.S. It has more than 125,000 employees across 80 offices in 30 countries. In FY23 the company generated $4.5 billion in revenue, with Digital Operations as its largest segment. Genpact is redefining industry standards by utilizing Google Cloud's big data services, intellectual property and accelerators, enabling significant innovation and growth across sectors such as finance, healthcare and retail. The company harnesses a complex mix of big data to deliver actionable insights for strategic decision-making while pioneering GenAI solutions on Google Cloud to enhance efficiency and creativity across various highly regulated industries.

Strengths

GenAI on Google Cloud: Genpact's early-mover GenAI solutions on Google Gemini, Bard, Duet AI and Vertex AI platforms offer creativity and efficiency to clients, especially in highly regulated sectors such as finance and healthcare. These solutions automate repetitive tasks, generate novel solutions and optimize processes across different functions. Genpact's Google Cloud GenAI solutions and accelerators empower client industries and functions to stay ahead of the curve. They help predict customer behaviors, optimize supply chain operations and enhance risk management strategies.

Strong intellectual property and accelerators: Genpact's Google Cloud big data services, intellectual property, platforms and accelerators represent a paradigm shift in how industries and functions harness the power of big data and AI to drive innovation and growth. With an in-depth understanding of various sectors ranging from finance and healthcare to retail, Genpact leverages Google Cloud's robust infrastructure to unlock the potential of big data in large and complex U.S. client landscapes.

Handling complex data mix: By ingesting, processing and analyzing vast amounts of mixed, structured and unstructured big data, Genpact enables organizations to derive actionable insights that fuel informed decision-making in near real-time, supporting business relevant and strategic initiatives.

Caution

Genpact's unique functional talent differentiator, particularly in financial services and healthcare domains, should be communicated more strategically, ambitiously and frequently, highlighting customer success in the U.S. market.

Managed Services

Who Should Read This Section

This report is relevant to businesses across industries in the U.S. for evaluating providers of managed services for Google Cloud. In this quadrant, ISG outlines the current market positioning of these providers and examines how they tackle critical challenges associated with offering these services within the Google Cloud ecosystem.

Adopting multicloud strategies is accelerating, making management and optimization across different cloud environments increasingly complex. GenAI is transforming the site reliability engineering (SRE) landscape, enabling teams to achieve high levels of reliability and efficiency.

Ensuring consistent security, governance and cost control across platforms has become a significant hurdle. Global system integrators (GSIs) and Google Cloud are developing comprehensive multicloud management platforms that provide centralized visibility, control and automation across different cloud environments to achieve governance, security and cost management.

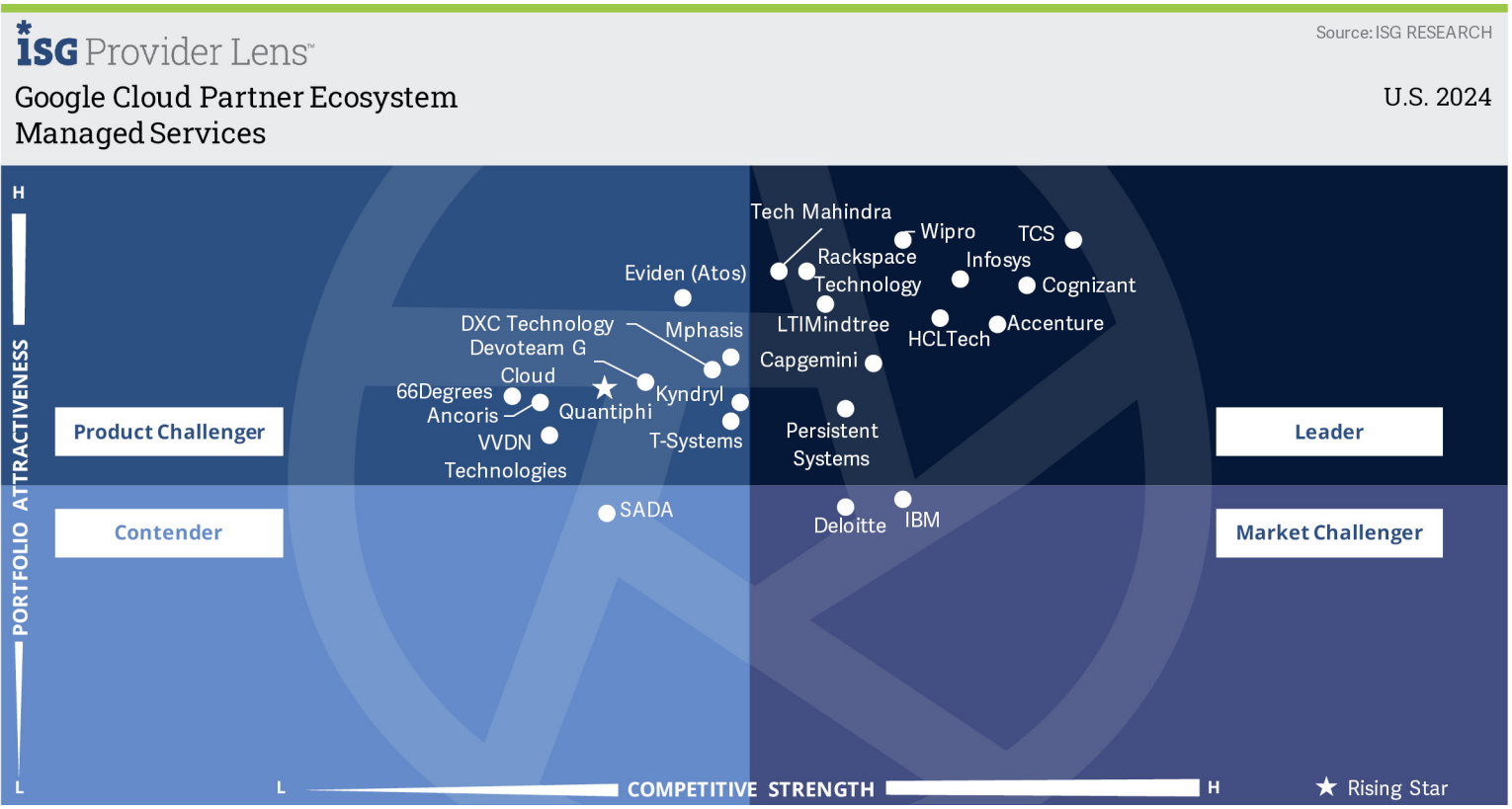
Enterprises need effective tools and strategies to monitor, optimize and control cloud spending to prevent budget overruns and ensure efficient resource utilization. GSIs are helping enterprises implement FinOps practices, aiding the broader adoption of tools such as Google Cloud's Active Assist and Cloud Billing reports to gain granular visibility into spending and implement effective cost management strategies.

AI and ML present opportunities for optimization and automation, yet integrating these technologies into the existing workflows and infrastructure can be complex, requiring specialized skills and infrastructure. GSIs address the talent gap by offering various services, including staff augmentation, training programs and knowledge transfer initiatives.

Technology professionals should read this report to understand providers' relative positioning and capabilities in offering Google Cloud managed services and assess their comparative position.

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

Procurement professionals should read this report to learn about Google Cloud managed service providers in the U.S. and understand their competitive advantages.



This quadrant assesses service providers supporting enterprises with **Google Cloud operations and performance**. Managed services advance from maintaining cloud environments to **optimizing enterprise client workloads**, focusing on governance, risk and compliance (GRC), ESG and SRE.

Tapati Bandopadhyay

Definition

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

Service providers typically offer significant levels of automation and transparency over the managed cloud resource pool to customers by using specially developed or licensed cloud management platforms (CMPs) and tools. SLAs for managed services normally encompass a wide range of services to drive business value, such as data management and governance, ML capabilities, and ESG and sustainability tools and assets. Managed service providers also have teams well versed in Google Cloud-native skills such as cloud-native operations, site reliability engineering (SRE) and platform reliability engineering (PRE), as well as integrated practices like DataOps, ModelOps, MLOps, AIOps, and CloudFinOps. The maturity of managed services offerings for Google Cloud can also include the usage and impact of innovative intellectual property, including tools and service delivery frameworks. These include cloud FinOps, automation tools to improve service availability and resilience, cloud and data security, regulatory compliance and governance.

Eligibility Criteria

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

Observations

The accelerated adoption of cloud technologies originates from recognizing that virtualization is indispensable for business transformation. As enterprises embrace multicloud and hybrid cloud strategies, Google Anthos continues to gain traction. GSIs offer expertise in Anthos deployment and management, enabling consistent operations across diverse environments.

Cloud cost optimization: Considering increased scrutiny on cloud spending, GSIs will focus on cost optimization strategies, including using right-sizing resources and committed use discounts and leveraging spot instances for batch workloads. The increasing importance of FinOps will lead to specialized services, such as budgeting, forecasting, cost allocation and optimization strategies that help enterprises manage cloud costs effectively.

Focus on DataOps and ModelOps: With the increasing use of data analytics, AI and ML, DataOps and ModelOps practices are increasingly integrated into managed services. This integration supports efficient data pipelines, reliable model deployment and optimal performance monitoring.

Increased traction of infrastructure as code (IaC): IaC adoption will continue to rise, with GSIs providing services for IaC toolchains such as Terraform, facilitating consistent and automated infrastructure provisioning and management.

GenAI adoption in SRE: GenAI augments SRE functionality through predictive maintenance, automated remediation, anomaly detection and the creation of personalized training programs and simulations for SREs.

The demand for cloud experts will increase, prompting service providers to invest in training and development programs to attract and retain talented professionals.

From the 33 companies assessed for this study, 24 qualified for this quadrant, with 11 being Leaders and one Rising Star.

accenture

Accenture strengthens IT infrastructure management with its Cloud & Infrastructure managed services. It offers hosting and migration and supports evolution across cloud continuum spaces, enhancing business agility and operational flexibility.

Capgemini

Capgemini excels in transforming enterprises from technology-focused cost centers to sources of continuous business innovation and agility, positioning them ideally for thriving amid disruption.

cognizant

Cognizant facilitates large-scale infrastructure migration to the cloud, offering migration tools, factory models, prebuilt cloud migration solutions and governance frameworks.

HCLTech

HCLTech provides robust managed services for Google Cloud. The company emphasizes AIOps tools and frameworks to enhance operational efficiency.

Infosys

Infosys excels in managed services, providing a comprehensive cloud operation framework through Infosys Cobalt. This solution suite optimizes IT ecosystem resilience and agility and supports governance and compliance across financial, technical and operational needs.

LTIMindtree

LTIMindtree offers comprehensive cloud management services that streamline cloud migration with tools such as Infinity Cloud Platform, enhancing governance, security and cost optimization.

Persistent Systems excels in managed services and delivers cloud operations support, including technical support, optimization and advanced DevOps practices. Its FinOps, MLOps and DevSecOps capabilities support efficient, secure and compliant cloud infrastructures.

Rackspace Technology excels in managed services, offering 24/7 support through modern operations. It focuses on operational excellence from inception to operations. Elastic Engineering and Rackspace Managed Cloud enhance client adaptability and cloud operations management.

TCS delivers end-to-end cloud lifecycle services, including advisory, cloud build, application and data modernization, and managed services for hybrid environments, enhancing customer value through IoT and blockchain technologies.

Tech Mahindra's platform-enabled solutions leverage AI and automation to accelerate digital transformation. It focuses on creating future-ready IT infrastructures aligned with business needs.

Wipro, as a Premier Google Cloud Partner, excels in managed services. Leveraging its unique position in the Rapid Migration Program, it facilitates seamless transition to the cloud, followed by robust managed services across hybrid environments.

Quantiphi (Rising Star) prioritizes 100 percent SLA adherence and maintains compliance with GxP and HIPAA. It uses Information Technology Infrastructure Library (ITIL) processes for proactive issue monitoring and incident management.

SAP Workloads

Who Should Read This Section

This report is relevant to enterprises across industries in the U.S. for evaluating providers offering services related to Google Cloud SAP workloads. This quadrant highlights the current market positioning of these providers and assesses how they tackle key challenges encountered by enterprises in the region.

Providers embark on migrating SAP to the cloud to fuel digital transformation, lower costs and simplify processes. Enterprises are adopting brownfield projects for mature processes with minimum process redesign. Over the past few years, adopting the RISE with SAP proposition has been a significant milestone for many companies. By collaborating with Google Cloud, the RISE with SAP facilitates an enhanced framework for transitioning to the cloud as a business transformation-as-a-service solution.

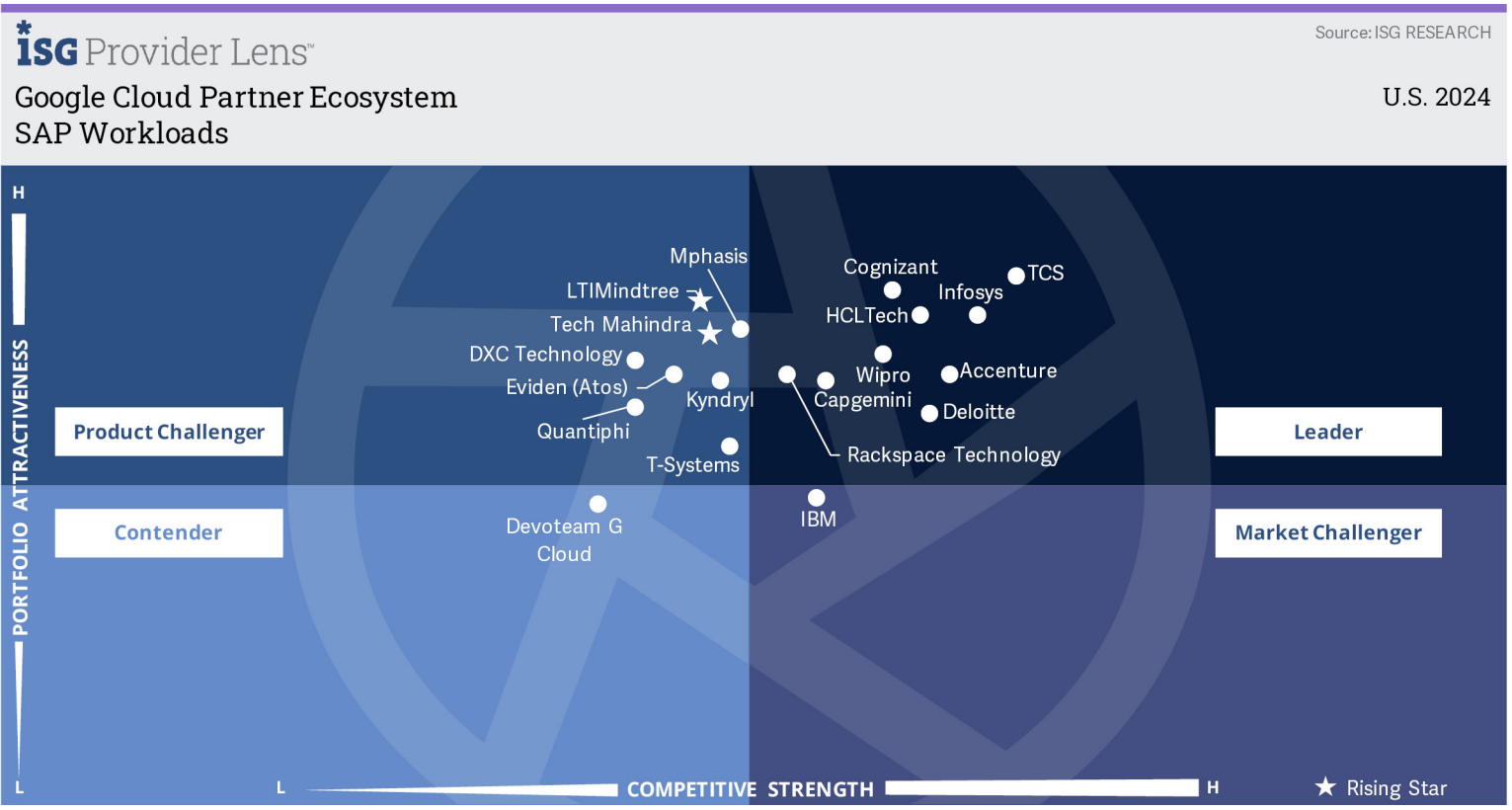
Organizations are harnessing Google Cloud's GenAI and analytics features to enhance SAP applications. Service providers strongly emphasize integrating Agile and DevOps methodologies into SAP services throughout the entire lifecycle, including development, implementation and managed services. These providers have also created in-house tools to facilitate the delivery of SAP S/4HANA services. Google Cloud and service providers are collaborating to simplify data comprehension from SAP systems for informed decision-making.

A strong emphasis on the RISE with SAP is driving providers to improve their capabilities within the Google Cloud and SAP ecosystems to handle crucial SAP workloads. Providers are formulating a well-structured business model that caters to SAP and non-SAP applications operating on Google Cloud. This strategic approach facilitates seamless integration and optimal performance for clients' systems.

Technology professionals should read this report to understand the Google Cloud SAP Workloads service provider landscape, compare their capabilities and completely harness them.

Finance professionals should review this report to understand the placement of SAP providers on Google Cloud and assess how they can enhance their routine critical processes.

Procurement professionals should read this report to understand the capabilities of Google Cloud SAP Workloads service providers in the U.S. and their competitive advantages.



This quadrant assesses service providers that can help enterprises manage **SAP operations on Google Cloud**. Providers covered in this quadrant are highly competent with Google Cloud to **facilitate seamless SAP consulting, integration and workload transformation**.

Tapati Bandopadhyay

Definition

This quadrant assesses service providers that offer provisioning and ongoing operations for SAP systems, such as SAP HANA on Google Cloud and its central management. These service providers use Google Cloud as a hardware replacement or hardware extension (as IaaS) in customer companies and optimize, design and develop new processes and business services as part of platform management. They do this by combining their services with SAP services and Google. This group of professional IT service providers is responsible for implementing and ensuring subsequent operations.

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

Eligibility Criteria

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

Observations

Organizations prioritize modernizing application workloads by migrating them to an SAP infrastructure across varied business domains. There is a notable increase in the adoption of brownfield SAP transformations on Google Cloud. Core clients' fundamental requirements have remained consistent; they seek specialized expertise in SAP and Google Cloud technologies, cost optimization and data security. Businesses increasingly utilize AI and ML to automate tasks, enhance decision-making and extract valuable insights from SAP processes.

Some of the key observations for this quadrant are presented below:

Enhanced offerings by fostering stronger relationships with SAP and Google Cloud: Enterprises are adopting the RISE with SAP proposition, SAP S/4HANA Cloud and SAP BTP on Google Cloud to expedite their digital transformation efforts. The drive to adopt the RISE with SAP and other SAP offerings has prompted service providers to strengthen their relationship with Google Cloud and SAP, customize their operational models and enhance workforce expertise on Google Cloud and SAP skills.

GenAI improving SAP operations: By integrating GenAI capabilities into SAP software and Google Cloud, enterprises deploy robust solutions that leverage data from the SAP Datasphere, significantly enhancing business insights, analysis and decision-making processes.

Advancing skillsets and migration strategies: The recent collaboration between SAP and Google BigQuery integrates robust data models and real-time processes. This shift toward more advanced and integrated platforms has bolstered service providers' efforts to enhance their skillsets and migration methodologies.

From the 33 companies assessed for this study, 19 qualified for this quadrant, with nine being Leaders and two Rising Stars.

accenture

Accenture's SAP services, such as the RISE with SAP and SAP S/4HANA, focus on rapid transformation and sustainability, enhancing business flexibility and value extraction.

Capgemini

Capgemini facilitates seamless SAP workload migrations to AWS, boosting agility and leveraging best practices for minimal risk.

cognizant

Cognizant leverages its profound SAP expertise and Google Cloud's advanced infrastructure to drive substantial enterprise modernization, significantly enhancing IT landscapes and operational efficiencies.

Deloitte

Deloitte's SAP solutions on Google Cloud reimagines enterprise responsiveness and adaptability, integrating best practices and advanced technologies to accelerate the transformation and enhance enterprise agility.

HCLTech

HCLTech offers comprehensive SAP services on Google Cloud, from assessments and advisory to full-stack implementation. Its approach includes cloud adoption strategies, operational transformations and specialized intellectual property to optimize SAP deployments.

Infosys offers extensive expertise in SAP solutions, providing secure and seamless transitions to cloud platforms such as AWS, Azure and Google Cloud, with its comprehensive SAP on AWS as part of Infosys Cobalt.

Rackspace Technology supports comprehensive SAP solutions, facilitating smooth transitions from ECC to S4/HANA on Google Cloud, supported by extensive case studies and expert insights.

TCS, as a strategic partner of SAP, provides cloud-based and on-premises solutions on the SAP Business Technology Platform, ensuring flexible and scalable enterprise applications.

Wipro offers comprehensive SAP solutions on Google Cloud, from advisory to managed services, enabling optimized cloud strategies and integration for enhanced enterprise efficiency and agility.

LTIMindtree (Rising Star) supports comprehensive SAP workload migrations with automation tools, enhancing cloud transitions and integrating SAP services across various platforms.

Tech Mahindra (Rising Star) provides cloud-based and on-premises SAP solutions, enhancing cloud migration with tools such as AWS Launch Wizard and gaining recognition on Google Cloud.

Workspace Services

Who Should Read This Section

This report is relevant to U.S. enterprises seeking to evaluate Google Workspace service providers, covering associated advisory, migration and integration services. This quadrant focuses on the current market positioning of these providers and their approach to address key challenges faced by enterprises in the region. ISG assesses based on the depth and breadth of providers' service offerings and market presence.

Solutions catering to the evolving hybrid work model include enhanced security features for remote access, improved collaboration tools, and integrations with various productivity and communication platforms. GSIs integrate AI and automation into Workspace tools, focusing on areas such as smart scheduling and meeting management, automated document processing and analysis, personalized learning and development recommendations, and predictive insights for improved decision-making.

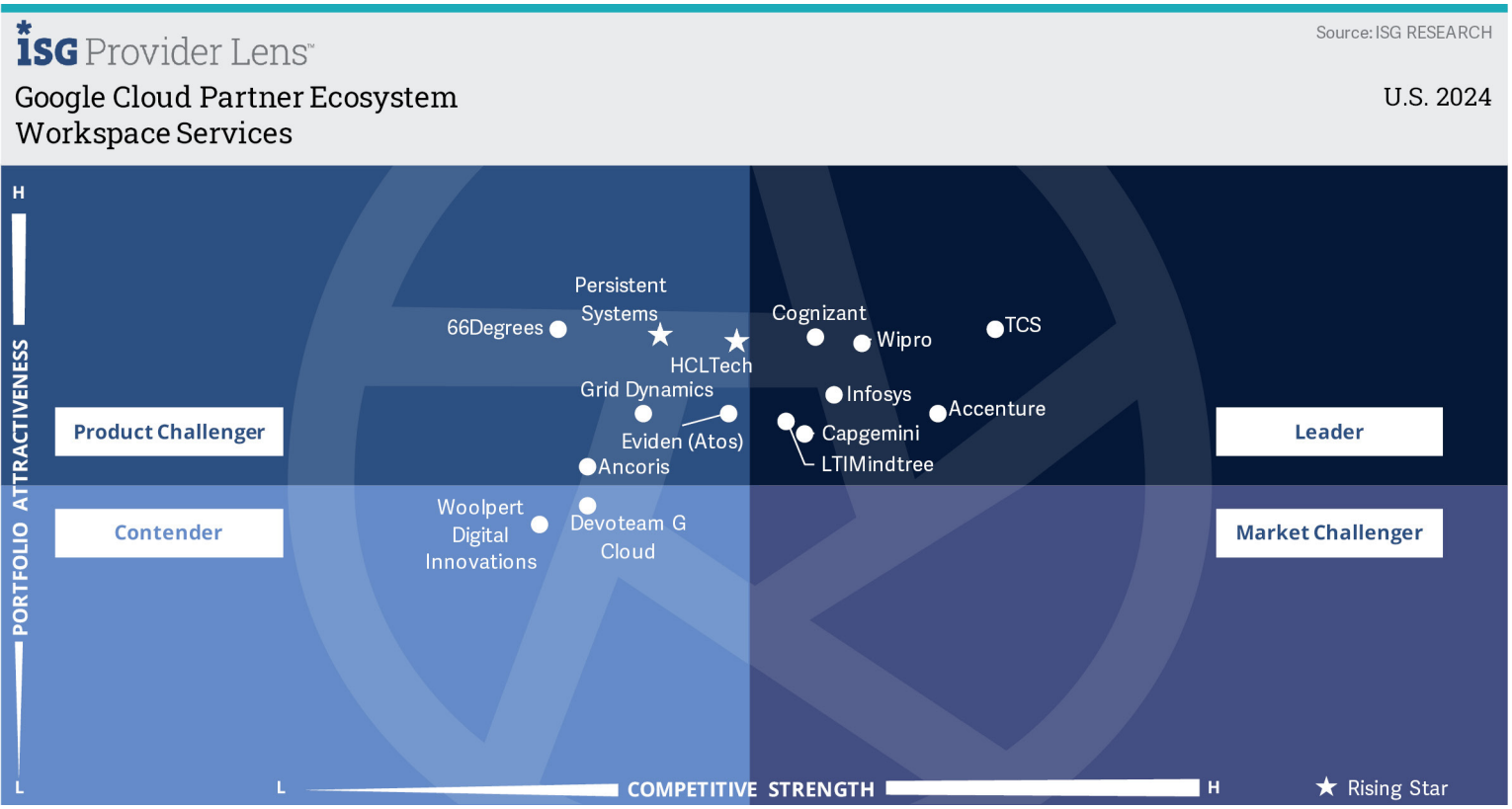
Clients' needs and expectations are constantly changing. Providers in the U.S. demonstrate agility and adaptability to remain ahead of the curve and meet these evolving demands. Service providers prioritize customer satisfaction by providing ongoing support, training and change management services to support seamless workspace adoption and utilization.

GSIs continue to focus on expanding their portfolio and talent acquisition and building strong partnerships with Google Cloud. Large enterprises exhibit high traction in adopting Google Workspace, highlighting the significance of change management and user adoption strategies. Providers should evolve by offering more strategic consulting services and focusing on complex integrations and customizations to differentiate themselves through specialization, innovation and customer service.

Technology professionals should read this report to understand providers' relative positioning and capabilities to effectively use Google Workspace services and assess their comparative position.

Digital professionals should read this report to comprehend the positioning of Google Workspace service providers and evaluate their impact on clients' ongoing transformation.

Workspace professionals should read this report to evaluate Google Workspace service providers in the U.S. and understand their differentiating factors.



This quadrant evaluates service providers that support enterprises with **Google Workspace services and lifecycle management** of the workspace suite. Providers leverage the latest advancements in Google Workspace to **enhance productivity and experience.**

Tapati Bandopadhyay

Definition

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

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

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

Eligibility Criteria

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

Observations

Google Workspace, a highly sought-after cloud-native communication, productivity and collaboration platform, integrates essential work tools, task management solutions and enterprise-grade security. Enterprises have increasingly embraced the hybrid working model, which results in greater utilization of Google Workspace services.

ISG observes the following trends in this segment:

In-depth hybrid work expertise: Google Workspace solutions have transitioned from basic solutions to specialized offerings for hybrid work models. GSIs and Google Cloud collaborate to provide enterprises with tools and strategies, such as the space management solution, to facilitate equal participation and engagement for in-office and remote employees. Ample attention is dedicated to tackling hybrid work environments' security and compliance challenges with advanced data loss prevention, identity management and endpoint security solutions.

Change management and user adoption: GSIs prioritize UX during Google Workspace deployments and provide ongoing training and support to ensure user adoption and maximize the platform's value. They develop engaging training programs that cater to different learning styles and enable users to maximize the benefits of Google Workspace features.

Automation of tasks and workflows: Enterprises explore the potential of GenAI tools such as Gemini for Workspace, previously Duet AI, to automate routine tasks and personalize user experience based on recommendations and insights into individual work patterns and preferences. GSIs assist businesses in automating workflows within Google Workspace and across other business applications using tools such as AppSheet and APIs.

From the 33 companies assessed for this study, 16 qualified for this quadrant, with seven being Leaders and two Rising Stars.

accenture

Accenture's Digital Workplace integrates physical, human and digital dimensions, fostering an environment that boosts productivity and innovation.

Capgemini

Capgemini's Connected Workspace services enhance digital transformation by providing flexible, efficient, and secure connectivity and support.

cognizant

Cognizant focuses on Google Workspace collaboration, prioritizing customer application development and legacy apps integration.

Infosys

Infosys modernizes workplaces with its Cloud Workspace Services, enhancing productivity and security for hybrid work environments through digital workplace transformation and immersive workspace solutions.

LTIMindtree

LTIMindtree's Digital Workspace Services (DWS) transform traditional work environments using Google Workspace solutions, improving productivity and UX through innovative digital workplace strategies.

TCS TATA CONSULTANCY SERVICES

TCS enhances workplace productivity through Google Workspace migration and integration, offering a blend of AI-enhanced tools and services for workspace transformation.

Wipro's Thrive service integrates Google Workspace into client operations, emphasizing security, compliance and productivity and facilitating enterprises to completely leverage cloud-native collaboration tools.

HCLTech

HCLTech (Rising Star) enhances digital workspaces through extensive Google Cloud managed services, consulting and end-user training. Its offerings are designed to improve flexibility, productivity and security for enterprises transitioning to cloud-native applications.

Persistent Systems (Rising Star) offers extensive Google Workspace Services and end-to-end migration and management solutions. Its services include security configurations, managed services and custom workflow automation, highlighting zero trust and IAM strategies.

Star of Excellence

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

Source: ISG Star of Excellence™ research program, Insights till [June] 2024

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

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

Client Business Role

▲ Most satisfied
Human Resources

▼ Least satisfied
Shared Services Operations

Region

▲ Most satisfied
North America

▼ Least satisfied
Middle East

Industry

▲ Most satisfied
Retail

▼ Least satisfied
Pharmaceuticals and life sciences

Industry Average CX Score

▲ Highest CX: 83.8
▼ Lowest CX: 51.4

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

Most Important CX Pillar

Execution and Delivery

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

Appendix

Methodology & Team

The ISG Provider Lens 2024 – Google Cloud Partner Ecosystem research study analyzes the relevant software vendors/service providers in the U.S. 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 June 2024, 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

Lead Author

Dr. Tapati Bandopadhyay

Lead Analyst and Research Partner

Dr. Tapati Bandopadhyay has been an inventor, builder, practitioner and researcher in AI, intelligent automation and related domains, for 27+ years. She has been a global practice leader and executive-level advisor & consultant in AI-automation-cloud and services management, covering MLOps, AIOps, CloudOps, DataOps, ModelOps & DevOps metrics-driven practices and data and AI story-building and story-telling practices and tools.

As an ISG Lead Analyst on AWS and in AI-ML, consulting & managed services, she is responsible for defining and leading the ISG Provider Lens branded research projects for the US market. With more than 25 years of experience focused on AI, ML, data sciences and intelligent automation technology development, strategy and adoption practices across key industries, including BFSI, manufacturing & FMCG, retail, media, hi-tech & telco's, governments and healthcare services.

Research Analyst

Sameen Mohammed Siddique

Research Specialist

Sameen is a research specialist with ISG, with a key interest in the market and industry research across emerging technologies. She supports and co-authors Provider Lens™ studies on intelligent automation, mainframes, Google Cloud and others. She is also involved in authoring enterprise context and global summary reports with market trends and insights. Her areas of expertise are automation, hyperscaler ecosystem, telecommunication, and retail.

Sameen has been a part of diverse market, business, and consumer research teams, effectively transforming market data into actionable insights and intelligence reports for several leading companies. In her prior roles, she has worked on qualitative and quantitative research, market feasibility studies, SWOT assessment, and competitive analysis.

Study Sponsor

Aman Munglani

Director Ecosystem Studies,
Custom Research & Digital innovator series

A recognized thought leader and industry advisor with over 23 years of experience in emerging technologies, Emerging vendors and infrastructure, Aman Munglani has spent much of his professional life advising the C-suite of Global 2000 companies on digital strategies, start-up engagement, innovation, technology roadmaps and vendor management. Prior to ISG, Aman spent twelve plus years at Gartner guiding CIOs and IT managers across Asia Pacific and Europe on emerging technologies, their use cases and maturity, infrastructure trends and technologies, vendor comparisons, and RFP reviews. He also advised many global and Asia-Pacific vendor organizations on their go to market, product and pricing strategies and applicable competitive scenarios.

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 analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

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

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