ISG Provider Lens™

Google Cloud Partner Ecosystem

Data Analytics and Machine Learning

A research report comparing provider strengths, challenges and competitive differentiators

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QUADRANT REPORT | JUNE 2023 | EUROPE

Table of Contents

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

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

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

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

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

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

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

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

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

Ecosystem providers play a key role in helping firms optimize their cloud economics, for example, by providing consulting and advisory services that help firms evaluate different cloud options and create roadmaps for a multicloud strategy. This year ISG notes the growing prominence of sophisticated FinOps frameworks and tools developed by several providers for GCP and other public clouds. These FinOps tools can measure cloud spend and relative usage down to the departmental or team level, identify opportunities to eliminate unnecessary cloud spending, re-allocate capacity to areas of higher business demand, and potentially institute charge back mechanisms in areas of overspending.

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

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

The overall market for cloud services in Europe remains mixed, with growth dampened by the global tech slowdown, a sluggish economy and increased pressure on IT budgets. According to the ISG Index, the demand for IT and business services in Europe declined by 5 percent YoY in the first quarter of 2023, with managed services declining by 4 percent YoY and cloud-based services down by 6 percent. Regional demand varied, with U.K. managed services down by 2 percent YoY, and DACH down by 21 percent YoY, but France managed services revenues remained buoyant with 27 percent YoY growth. EMEA IaaS dropped 10 percent YoY in the first quarter, with the top three hyperscalers experiencing a 12 percent YoY decline, the first ever recorded.

Yet within this overall picture of slowing cloud consumption in Europe, Google Cloud appears relatively resilient. Nearly every ecosystem provider we surveyed for this report saw increasing demand for GCP and related services in Europe. Demand remains robust in the U.K., moderate in the DACH and Benelux regions, and relatively weak in the Nordics. Google Cloud's ability to weather the broader tech slowdown is due in part to its focus on the areas that are now top-of-mind for enterprise IT decision-makers: demand for big data, ML and analytics capabilities; the need for data modernization and integration; the growing sustainability imperative at the C-level; an increased focus on cloud economics and FinOps solutions; and the increasing integration of data and cloud strategies. With pressure on enterprise budgets, some providers see more demand for fast-cycle POCs and projects with clear ROI in Europe. However, enterprises are still cautious with their risk appetites for wider cloud transformation, and demand for lift-and-shift implementations on GCP is still significant. Finally, with European regulations around data and AI continuing to emerge, there is a growing demand for sovereign cloud solutions for GCP in Europe, with enterprises looking for additional capabilities to secure and segregate their data within defined geographic borders.

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

Provider Positioning

Page 1 of 5

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

Provider Positioning

Page 2 of 5

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

Provider Positioning

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

Provider Positioning

Page 4 of 5

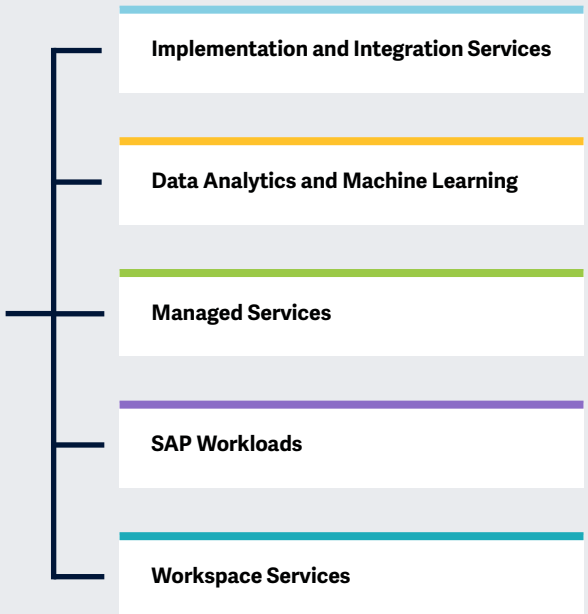
	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Persistent Systems	Product Challenger	Product Challenger	Not In	Not In	Not In
Promevo	Not In	Not In	Not In	Not In	Contender
Quantiphi	Not In	Leader	Not In	Not In	Not In
Rackspace Technology	Product Challenger	Not In	Product Challenger	Product Challenger	Not In
Revevol	Not In	Not In	Not In	Not In	Contender
Revolgy	Not In	Not In	Contender	Not In	Contender
Sabio	Not In	Product Challenger	Not In	Not In	Not In
SFEIR	Contender	Contender	Not In	Not In	Not In
Softserve	Not In	Product Challenger	Not In	Not In	Not In

Provider Positioning

Page 5 of 5

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

Key focus areas of **Google Cloud Ecosystem** 2023 study.



Simplified Illustration; Source: ISG 2023

Definition

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

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

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

Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following 5 (number of quadrants) quadrants for services: Implementation and Integration Services, Data Analytics and Machine Learning, Managed Services, SAP Workloads, and Workspace Services.

This ISG Provider Lens™ study offers IT decision makers with the following:

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

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

Provider Classifications

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

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

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

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

Provider Classifications: Quadrant Key

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

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.

Data Analytics and Machine Learning

Who Should Read This Section

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

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

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

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

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

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

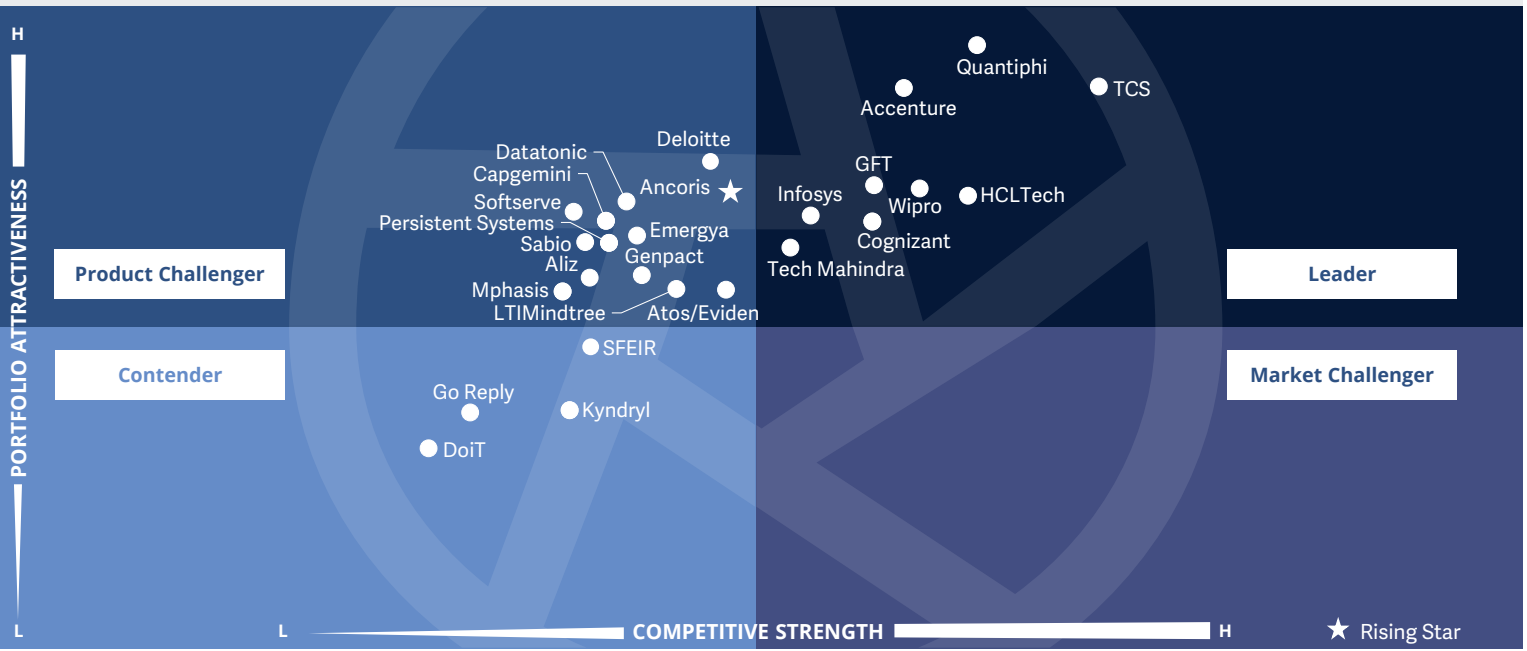
Digital Professionals should read this report to understand the positioning of Google Cloud data analytics and ML service providers and how they can impact clients' ongoing transformation.

ISG Provider Lens™

Source: ISG RESEARCH

Google Cloud Partner Ecosystem
Data Analytics and Machine Learning

Europe 2023



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

Mark Purdy

Definition

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

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

Eligibility Criteria

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

Observations

DAML on GCP represents one of the fastest and most intensely competitive parts of the Google ecosystem in Europe, as enterprises seek to gain greater insights and competitive advantage from their data. ISG sees several important trends in this arena. First, there has been a surge in demand for data migration and modernization services, as enterprises seek to marshal data from organizational siloes and legacy databases on more modern, BigQuery-enabled data platforms. Providers are helping enterprises explore new data architectures, moving from old-fashioned data lakes to AI-enabled data meshes and fabrics. Better data governance is seen as a prerequisite for firms' citizen AI and data democratization initiatives and critical to developing new AI use cases and industry applications. Second, and relatedly, providers are investing significantly in data migration tools to move existing databases—Databricks, Snowflake or Teradata, for instance—to GCP securely and rapidly. Third, providers are crafting new vertical-specific solutions using GCP-native tools in areas such as trade controls, consumer marketing and supply chains. Fourth, providers are integrating other elements of next-generation technologies into their DAML offerings, for example, by connecting data from IoT devices (such as in transport fleets or factories) to power digital twins or industrial metaverse applications. Fifth, most leading providers are looking to integrate large language or generative AI technologies into their DAML offerings for GCP. Some are launch partners for Google Bard, although enterprise applications of generative AI are still at an embryonic stage.

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

accenture

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

cognizant

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

GFT

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

HCLTech

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

Infosys

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

Quantiphi

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

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

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

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

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

Rising Star

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

Mark Purdy

Ancoris

Overview

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

Strengths

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

Client traction: Ancoris has a large client base for its DAML services, especially in the U.K. and beyond. For a major healthcare provider, it built a data warehouse with a single patient view integrated with Google BigQuery. For a major household goods manufacturer, it created a data warehouse powered by Google Cloud with data visualization capabilities and executive insights provided by Looker Studio. It has also created geo-location-based services (using Google Maps APIs) for a global food delivery company and for a leading U.K. insurance provider.

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

Caution

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

Appendix

Methodology & Team

The ISG Provider Lens™ 2023 – Google Cloud Partner Ecosystem report analyzes the relevant software vendors/service providers in the European market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research™ methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research™ programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of May 2023 for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

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

Lead Author

Mark Purdy

Lead Europe Analyst, ISG Provider Lens™

Mark Purdy is a Lead Analyst for Europe at ISG Provider Lens™ and brings more than 25 years of experience working on economics and technology research in business and government. Mark has a particular focus on next-generation technologies, especially artificial intelligence and intelligent automation, digital twins, digital olfaction, machine learning, virtual reality and edge computing.

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

Research and Global Overview Analyst

Srinivasan

Research Analyst

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

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

IPL Product Owner

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 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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