ISG Provider Lens™

Google Cloud Partner Ecosystem

A report summarizing the global and regional trends of Google Cloud Partner ecosystem

GLOBAL SUMMARY REPORT | **SEPTEMBER 2022**

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Global Market Trends

Multicloud adoption is on rise: Both enterprises and service providers are moving toward the adoption of multicloud ecosystems, which will reduce the probabilities of vendor lock-in and the need to rely on single vendor. Multicloud ecosystems also offer various other benefits such as cloud storage, backup, advanced features, cost savings and high availability.

Focus on security: Enterprises have a strong focus toward the enhancement of security infrastructure. They are exploring more tools that help them combat the increasing number of data breaches and ransomware attacks.

Sustainability efforts: Service providers have a great vision toward sustainability development goals and commitments. Providers are investing heavily in building joint offerings with Google Cloud. Both enterprises and service providers are also sponsoring various industry events such as ideathons that promote and encourage sustainability.

Joint industry solutions and offerings: Several providers jointly develop various solutions and offerings in partnership with Google Cloud Solutions team. The team provides them with their technical expertise and a go-to-market strategy for the developed products. Few providers also work as engineering partners for Google Cloud to develop prototypes and test the developed products along with the Google Cloud Solutions team.

Google Cloud is trying to keep pace with the maturity of the partner environment. Also, service providers are focusing on expanding their Google Cloud service portfolio in Australia. Although less mature than other platforms, the use of GCP is growing among global providers and local start-ups.

The vendors that can resource and provide business outcomes will thrive in the Australian Google Ecosystem.
– Phil Hassey, Regional Analyst, Australia

Growth in the cloud market in Brazil

Although cloud investments are still low compared to global spending, Brazilian enterprises are rapidly increasing the spend both on cloud infrastructure and Google Cloud Platform.

Cloud native begins to be a technological trend

With enterprises adopting a cloud-native approach, Google Cloud can be increasingly beneficial for them, with its array of native tools and capabilities in areas such as data warehousing, analytics and machine learning.

- Google Cloud is gaining traction because of its strong environmental performance and the wide array of tools it provides to help enterprises track and manage the environmental impact of their cloud operations. Enterprises consider GCP as an important lever to help achieve their net-zero goals.

- Enterprises in Europe that want to generate significant value from their data find Google's data science insights and capabilities attractive. They are seeking data science insights beyond just analytics (revenue leakage, productivity, profitability, etc.) and better ways to market and monetize their data. Google Cloud can be the best choice for these enterprises.

- Google Cloud is also gaining popularity as it associates with enterprises' citizen developer programs; such programs enable the development of easier tools for data citizens and create a great scope for data enrichment by joining internal data with massive external data sources.

- Google Workspace, although still relatively nascent, is gaining attention because of its ease of access and use across both business and consumer technology. It has become important, given the rise of remote and hybrid working during the pandemic. It is gaining popularity among digital-native enterprises and companies with legacy or on-premises workforce communication systems that are looking to migrate to the cloud for the first time.

Unique Geography Trends

Sustainability, data analytics, and demand for hybrid working technologies are driving greater enterprise attention to Google Cloud in Europe.

Mark Purdy, Lead Author, Europe

- The adoption of GCP in the U.S. has emerged as one of the fastest-growing cloud-based digital transformation strategies.

- Several large enterprises in the U.S. prefer GCP, becuase it provides multiple services that support big data, analytics and AI-based cloud infrastructure.

- Talent retention and attraction is one of the key challenges in the U.S. market. Service providers need to have innovative and disruptive talent strategies to address this challenge.

Strong Google Cloud expertise: Service providers with strong expertise in Google Cloud technologies offer a broad spectrum of Google Cloud service offerings, regardless of their size and industry.

Talent development: Service providers are increasingly investing in hiring, retaining and training talent in Google Cloud services. This is often considered as one of the key parameters for any enterprise to partner with them. These providers are also investing in cross skilling the professionals in Google Cloud services, which can be beneficial during client engagements.

Robust partner ecosystem: Service providers develop a strong and robust partner ecosystem with Google Cloud. This enables them to be a preferred partner for any solution launch, prototype, product development and co-innovation. The partnership can also provide them with go-to-market support for their service offerings.

Investment in accelerators and intellectual properties: Enterprises and providers are focusing and investing in developing assets/intellectual properties through accelerators, labs and innovation excellence centers. These strategic investments in multiple labs, which offer proof of value to enterprises, help build journey maps and achieve targeted ROI.

Focus on vertical offerings: Providers are increasingly investing in developing offerings, solutions and frameworks that suit various needs of enterprises from different industries, including banking and finance, retail, and others. They deliver these vertical-specific offerings in an agile and secure manner and are highly appreciated by enterprise clients.

Common Leaders Identified Across Geographies for Google Cloud Partner Ecosystem 2022

Service Providers	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Accenture	U.S., Australia, Brazil, Europe	U.S., Australia, Brazil, Europe	U.S., Brazil, Europe	U.S., Australia, Brazil, Europe	U.S., Brazil, Europe
Capgemini	U.S.	U.S.	U.S.	U.S.	U.S., Brazil, Europe
Cognizant	U.S., Europe	U.S.	U.S., Europe	U.S.	U.S.
Deloitte	U.S., Australia, Brazil	U.S., Australia, Brazil		U.S., Australia, Brazil	
Engineering Brasil	Brazil	Brazil	Brazil		
Gentrop					Brazil
GFT		Europe			
HCL	U.S., Europe	U.S., Europe	U.S., Australia, Europe	U.S.	
IBM	Europe	Europe	Europe	Europe	
Infosys	U.S., Australia, Europe	U.S., Europe	U.S., Australia, Europe	U.S.	U.S.

● Australia ● Brazil ● Europe ● U.S.

Common Leaders Identified Across Geographies for Google Cloud Partner Ecosystem 2022

Service Providers	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
IPNET	● (Brazil)		● (Brazil)		● (Brazil)
Kasna	● (Australia)	● (Australia)			
Mindtree	● (U.S.)	● (U.S.)			
Quantiphi		● (Europe)			
Rackspace Technology	● (U.S.)		● (U.S.)		
Santo Digital	● (Brazil)	● (Brazil)			● (Brazil)
Sauter			● (Brazil)		
Servian	● (Australia)	● (Australia)	● (Australia)	● (Australia)	
TCS	● (U.S.) ● (Australia) ● (Europe)	● (U.S.) ● (Australia) ● (Europe)	● (U.S.) ● (Australia) ● (Europe)	● (U.S.) ● (Europe)	● (U.S.) ● (Europe)
Tech Mahindra	● (U.S.)	● (U.S.)			

● Australia   ● Brazil   ● Europe   ● U.S.

Common Leaders Identified Across Geographies for Google Cloud Partner Ecosystem 2022

Service Providers	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
TIVIT	●			●	
V8 Consulting			●		
Wipro	● ● ● ●	●	● ●	●	

● Australia   ● Brazil   ● Europe   ● U.S.

Rising Stars Across Geographies for Google Cloud Partner Ecosystem 2022

Quadrants	Australia	Brazil	Europe	U.S.
Implementation and Integration Services	HCL	Sauter	CTS, Rackspace Technology	Persistent Systems, Quantiphi
Data Analytics and Machine Learning	PwC		Ancoris, Tech Mahindra	Persistent Systems, Quantiphi
Managed Services	Deloitte	Santo Digital	Rackspace Technology	Mindtree, Tech Mahindra
SAP Workloads	Kyndryl, TCS			Mindtree, Tech Mahindra
Workspace Services				Cognizant

Who Should Read This

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

Sourcing and procurement professionals should read this report to understand the provider ecosystem for Google Cloud implementation and integration services and gain knowledge about how providers compare to one another.

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

Further Reading

Further Reading

Australia

Implementation and Integration Services

Data Analytics & Machine Learning

Managed Services

SAP Workloads

Brazil

Implementation and Integration Services

Data Analytics & Machine Learning

Managed Services

SAP Workloads

Workspace Services

Europe

Implementation and Integration Services

Data Analytics & Machine Learning

Managed Services

SAP Workloads

Workspace Services

U.S.

Implementation and Integration Services

Data Analytics & Machine Learning

Managed Services

SAP Workloads

Workspace Services

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With more than 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 well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

About Our Company & Research

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 website.

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