Everest Group®

Everest Group Google Cloud Services PEAK Matrix® Assessment 2026

Focus on TCS

May 2026

PEAK MATRIX®

Introduction

The public cloud market continues to evolve as enterprises prioritize scalable digital foundations, AI-led innovation, and operational resilience. Google Cloud has strengthened its position in this landscape by deepening its capabilities across data platforms, Artificial Intelligence (AI), security, and cloud-native infrastructure, while also investing in purpose-built hardware such as Tensor Processing Units (TPUs) and enterprise-grade generative AI offerings, including Gemini.

As Google Cloud sharpens its strategic emphasis on AI-enabled enterprise transformation, industry-aligned solutions, sovereign cloud capabilities, and ecosystem-led co-innovation, enterprises are turning to Google Cloud Service Providers (SPs) to accelerate adoption and scale outcomes. SPs are playing a pivotal role in translating platform innovation into enterprise-ready solutions by combining domain expertise with migration and modernization capabilities, data engineering, AI integration, and managed services. Clients expect providers to demonstrate end-to-end capabilities across build, run, governance, and optimization, while embedding FinOps, security, responsible AI, and performance management practices into delivery models. In this research, we present an assessment and detailed profiles of 24 Google Cloud SPs featured on Google Cloud Services PEAK Matrix® Assessment 2026. The assessment is based on Everest Group's annual Request for Information (RFI) process for the calendar year 2026, interactions with leading Google Cloud SPs, client reference checks, and an ongoing analysis of the cloud services market.

In the report includes the profiles of the following 24 leading Google Cloud SPs featured on the Google Cloud services PEAK Matrix:

- **Leaders:** Accenture, Capgemini, Cognizant, Deloitte, HCLTech, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, Insight, Kyndryl, LTM, NTT DATA, Onix, Persistent Systems, PwC, Quantiphi, Tech Mahindra, Virtusa, and Xebia
- **Aspirants:** EPAM, Mphasis, Rackspace Technology, and Reply

Scope of this report

Geography: global

Industry: 24 Google Cloud SPs

Services: Google Cloud services

Market definition

Consulting/assessment services

- Strategy formulation, TCO analysis, cloud adoption roadmap, and cloud security consulting
- Public cloud feasibility assessment, vulnerability assessment, and security framework assessment

Design/implementation services

- Design, build, implement, and integrate with public cloud infrastructure
- App/Workload lift and shift, modernization, Google Cloud-native application development, integration of workloads with Google Cloud services, and API integration

Operate services

- Monitoring, automation, and configuration support for workloads
- Management, capacity planning, optimization services such as DevSecOps, AIOps, and FinOps

Description of Google Cloud portfolio segments

Core infrastructure	Analytics & AI	Application development and delivery	Security	use case-specific solutions
Includes solutions focusing on foundational building blocks	Includes solutions focusing on data analysis, machine learning, and artificial intelligence	Includes tools and solutions for building and deploying applications	Includes solutions augmenting security features to protect data, applications, and infrastructure	Includes ready-to-use solutions tailored to specific horizontal and vertical use cases
Examples of AWS portfolio segments				
Google Cloud Compute Engine, Google Kubernetes Engine (GKE), Cloud Storage, etc.	AutoML, BigQuery, Blockchain Node Engine, Cloud Dataflow, Google Cloud Pub/Sub, Google Cloud Firestore, Vertex AI, etc.	App Engine, Cloud Build, Cloud Endpoints, Cloud Functions, Cloud Run, Firebase, etc.	Cloud Armor, BeyondCorp Enterprise, Security Command Center, Key Management Service (KMS), Chronicle, etc.	**Function-specific solutions:** Contact Center AI, Document AI, etc. **Industry-specific solutions:** Retail Search, Supply Chain Twin, etc.

Google Cloud services PEAK Matrix® characteristics

Leaders

Accenture, Capgemini, Cognizant, Deloitte, HCLTech, Infosys, TCS, and Wipro

- Leaders consistently deliver large-scale Google Cloud transformations – starting with consulting on cloud strategy, business case, target architecture, and governance – then executing modernization, security, and operations with repeatable playbooks and global delivery models
- AI-led growth is a core differentiator. Leaders industrialize generative AI and agentic AI with factory or foundry approaches, reusable accelerators, strong governance, and adoption programs that move beyond pilots into production outcomes
- Leaders show credible depth in complex enterprise modernization, including microservices, containers, serverless, legacy and mainframe modernization, plus Oracle and SAP workloads on Google Cloud, supported by strong ISV integrations and talent for data, security, and operations. However, marketplace packaging and buyer-verified cost outcomes can be uneven, and depth may vary by industry or region

Major Contenders

Atos, Insight, Kyndryl, LTM, NTT DATA, Onix, Persistent Systems, PwC, Quantiphi, Tech Mahindra, Virtusa, and Xebia

- Major Contenders demonstrate strong execution in automation-led modernization, data platform transformation, and AI-enabled programs, often supported by reusable accelerators and structured delivery frameworks
- They also exhibit differentiated strengths in specific domains such as sovereign and regulated cloud, verticalized industry IP, generative AI industrialization frameworks, or contact center transformation solutions, reflecting focused investments in targeted capability areas
- While they deliver credible Google Cloud modernization and AI transformation programs, depth in hyperscaler-centric ecosystem orchestration, marketplace presence, geographically balanced presence, and large-scale, multi-party co-innovation may be less pronounced compared to Leaders

Aspirants

EPAM, Mphasis, Rackspace Technology, and Reply

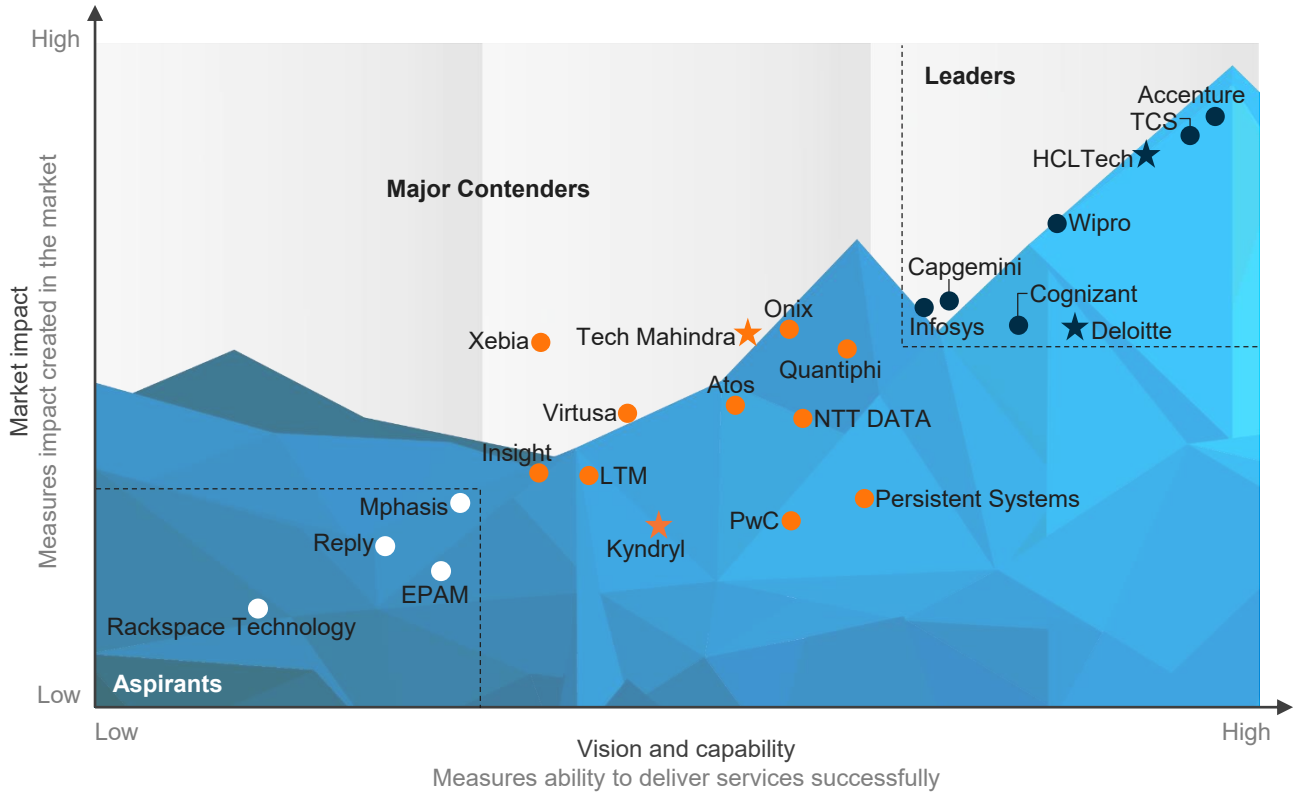
- Aspirants demonstrate capabilities in application modernization, migration, and managed cloud services on Google Cloud, with select accelerators and frameworks supporting AI adoption, cost governance, and cloud-native delivery
- While they can support mid-scale modernization and AI initiatives, enterprises prioritizing deep Google Cloud partnership credentials, broad consulting-led transformation programs, and large multi-region delivery models may need to validate ecosystem depth and advisory maturity
- Geographic delivery concentration and variability in verticalized accelerators may also limit suitability for highly complex or large-scale enterprise programs

Everest Group PEAK Matrix®

Google Cloud Services PEAK Matrix® Assessment 2026 | TCS is positioned as a Leader

Everest Group Google Cloud Services PEAK Matrix® Assessment 2026[1,2]

- ● Leaders
- ● Major Contenders
- ○ Aspirants
- ☆ Star Performers

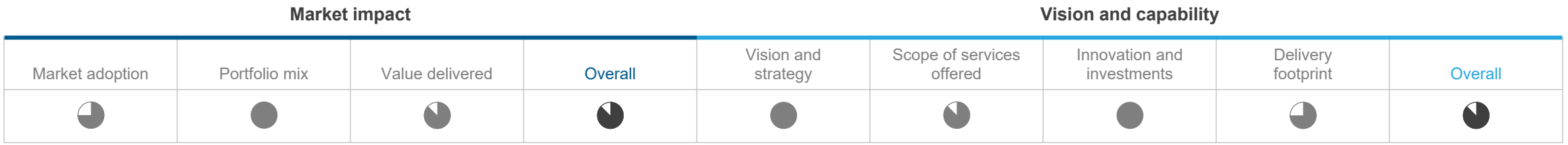


1 Assessments for Capgemini, Deloitte, EPAM, and Reply exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyers
2 Assessment for PwC and Rackspace Technology is based on partial participation/inputs and supplemented by Everest Group's estimates, leveraging its proprietary data assets, service provider public disclosures, and interactions with buyers
Source: Everest Group (2026)

TCS

Everest Group assessment – Leader

Measure of capability: Low High



Strengths

- Enterprises seeking accelerated Google Cloud delivery can leverage TCS' Gemini-powered delivery accelerators (such as Cloud Architect Assistant) and AI-enabled operating model to standardize Google Cloud migration
- Organizations building governed data products can leverage TCS' capabilities in data mesh and federated governance across BigQuery, Dataplex, Looker, and AlloyDB, supported by its Dexam framework
- Regulated enterprises can rely on TCS' security-led delivery model anchored in Secure Cloud Foundation, Google SecOps-based MDR, and Secure RaMP to embed guardrails-as-code and strengthen end-to-end security operations integration
- Organizations that are cost-pressured while scaling Google Cloud usage would benefit from TCS' FinOps posture anchored in TCS FinOps Transformation for Google Cloud and its Cloud FinOptimizer solutions
- Some clients have appreciated TCS' domain and data expertise and have found TCS cost-effective compared with peers

Limitations

- Enterprises pursuing agentic AI at production scale across multiple functions may need stronger, buyer-verifiable proof of multi-agent production hardening
- Public sector enterprises may need to closely assess TCS' Google Cloud capabilities, as there are limited proof points of expertise in these areas
- Enterprises expecting repeatable commercial levers upfront may need deeper negotiation, since some cost benefit mechanisms are described at a high level and can vary by deal and geography
- A few clients have highlighted opportunities to improve onboarding efficiency and accelerate the integration of new team members into ongoing Google Cloud engagements
- Some clients expect TCS to be more proactive in translating Google Cloud changes into clear impacts on roadmaps

Market trends

Google Cloud adoption is driven by agentic AI–led modernization, secure sovereign hybrid infrastructure, and a scaled, partner-led ecosystem

Market size and growth[1]

- The global Google Cloud services market is estimated at **US$21 billion in 2025**, with migration/ modernization services accounting for the largest share
- The market is expected to grow at **~16-17%**, supported by **AI-first** adoption and increasing demand for industry-aligned, compliance-ready modernization across regulated verticals
- **Analytics and AI workloads** continue to be among the fastest-growing segments, underpinned by **BigQuery**, **Gemini, and Vertex AI** integration across enterprise systems

Key drivers for Google Cloud services

Agentic AI-led data modernization	Google Cloud is positioning AI + data as an enterprise decision stack, with BigQuery, Vertex AI, and Gemini enabling governed, agent-driven automation across analytics and digital workflows.
Converged security and AI resilience	Google Cloud's unified, AI-augmented security approach is an adoption catalyst, bringing threat intel, SecOps, and cloud security into a single data fabric to protect agents and data.
Sovereign, high-performance hybrid cloud	Enterprise adoption is increasingly driven by sovereignty and latency-sensitive requirements, with hybrid deployments needing stronger data-boundary controls and high-throughput networking for distributed AI and data estates.
Productized partner ecosystem	Partners are shifting from co-engineered IP to packaged accelerators and playbooks that speed adoption.

Opportunities and challenges

Industrializing agentic AI	Enterprises are moving beyond pilots to operationalize cross-functional agent fleets, embedding standardized AgentOps, monitoring, and secure system integrations to drive scalable productivity and decision automation.
Productizing industry-specific solutions	Organizations are prioritizing deployable, compliance-ready industry AI packages that integrate seamlessly with core systems and data estates, enabling faster rollout across business units and geographies.
Demonstrating sustained business value from AI investments	Companies face mounting pressure to prove measurable, KPI-linked outcomes from scaled AI deployments while institutionalizing governance, risk controls, and cost discipline to sustain long-term value realization.
Evolving talent and delivery maturity	Enterprises face rising complexity in controlling agent behavior, ensuring auditability, preventing data leakage, and managing unpredictable token and execution costs as AI usage scales enterprise-wide.

1 Everest Group estimates

Key buyer considerations

Buyers are prioritizing production-ready AI and distributed cloud capabilities, supported by deep ecosystems, flexible commercial models, and reusable IP for secure, scalable transformation

Key sourcing criteria

High

Priority

Low

Production-grade AI and agentic AI capability maturity

Demonstrates the ability to move generative AI and agentic use cases from pilot to governed production on Google Cloud, with embedded data readiness, security controls, and responsible AI guardrails.

Commercial and contractual flexibility

Aligns pricing with Google Cloud constructs, including co-investment funds, risk-sharing mechanisms, innovation incentives, and marketplace-based billing, supporting flexible and transformation-oriented deal structures.

Ecosystem depth within Google Cloud

Maintains strong specialization footprint, certification scale, launch-partner visibility, executive alignment, and demonstrable ecosystem embedding through tripartite partnerships.

IP-led acceleration and marketplace readiness

Offers reusable accelerators, agent libraries, modernization toolkits, and marketplace-listed solutions that reduce implementation time and standardize delivery.

Google Distributed Cloud (GDC) and edge deployment maturity

Demonstrates end-to-end capability across GDC Edge and hosted models, including support for connected, disconnected, and air-gapped environments, enabling secure AI and latency-sensitive workloads in regulated and distributed industries.

Summary analysis

As Google Cloud adoption matures, buyers are increasingly differentiating partners based on their ability to operationalize AI at scale rather than simply deploy pilots. Providers that can embed governance, security, and data controls directly into AI and distributed cloud architectures are better positioned to support enterprise-wide rollouts, particularly in regulated and latency-sensitive environments.

Beyond technical capability, enterprises are placing greater emphasis on how commercial models and alliance strength support long-term transformation. Pricing structures that align with Google Cloud programs and ecosystem integration signals such as certifications, specialization depth, and visible strategic alignment often serve as proxies for partnership durability and execution confidence.

Finally, reusable IP and marketplace-ready solutions are becoming important levers for accelerating outcomes. Partners that can standardize modernization, AI deployment, and edge use cases through pre-built assets tend to reduce implementation friction and improve time to value across complex Google Cloud programs.

Key takeaways for buyers

Prioritize Google Cloud partners that can industrialize agentic AI and data modernization with proven AgentOps, governed integrations, and secure-by-design delivery, while demonstrating cost discipline and sovereignty-ready execution for regulated environments

Shifts in provider capabilities

Enterprises prefer GSIs with a full lifecycle delivery capabilities for their Google Cloud transformation engagements. They are increasingly selecting GSIs that can deliver AI-enabled modernization on Google Cloud end to end, with strong BigQuery and Vertex AI skills, secure integration, and built-in monitoring, governance, and cost control.

Differentiation across provider types

Enterprises increasingly prefer GSIs that can orchestrate an ecosystem on Google Cloud. Buyers will differentiate GSIs based on ISV alliances, integration capability, and proven scale across regions and business units. Industry depth, reusable assets, and accountable run support for security, reliability, and cost control also matter.

Key innovations

Buyers are seeking partners with reusable Google Cloud IP, automation-first delivery, and outcome-based frameworks that reduce TCO and accelerate value realization. Leading SPs are blending FinOps and generative AI accelerators into managed operations to create business impact for enterprises.

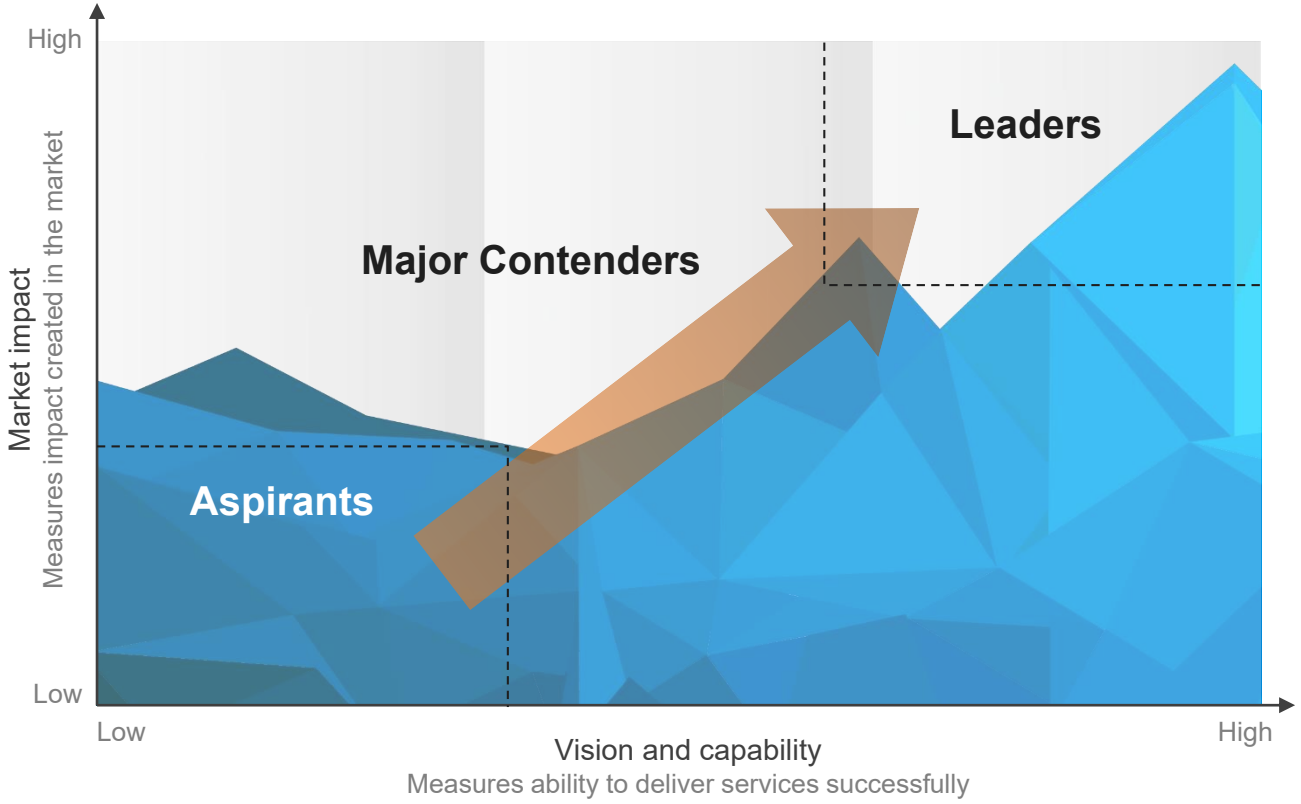
Appendix

PEAK Matrix® framework

FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



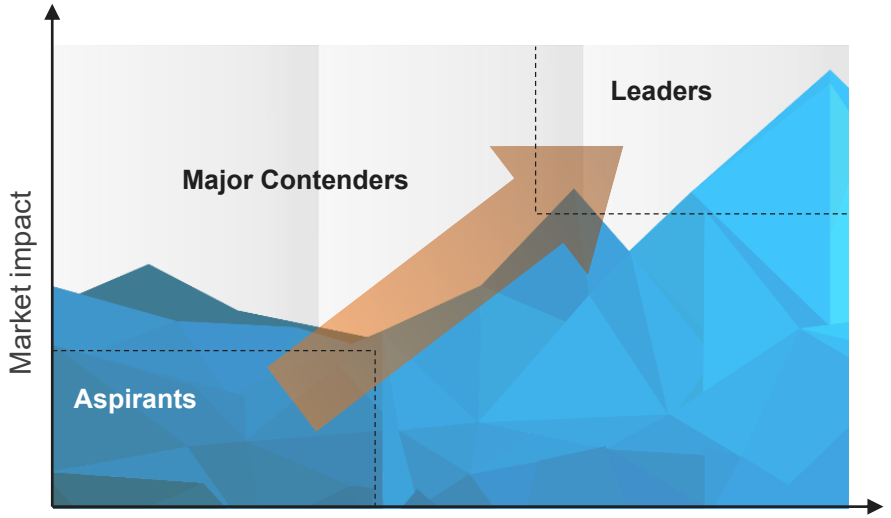
Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, YoY growth, and deal value/volume

Portfolio mix
Diversity of client/revenue base across geographies and type of engagements

Value delivered
Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy
Vision for the client and itself; future roadmap and strategy

Scope of services offered
Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint
Delivery footprint and global sourcing mix

FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being in included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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