ISG Provider Lens™

Google Cloud Partner Ecosystem

A research report comparing strengths and advantages of Google Cloud partners

Customized report courtesy of:

pwc

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Executive Summary

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Ecosystem partners drive enterprise value by leveraging Google Cloud AI, data and industry expertise

In 2025, the Google Cloud partner ecosystem is driving significant enterprise value within the U.S. by leveraging Google Cloud's strengths in AI, data modernization and analytics, security, and open, scalable infrastructure. Global system integrators (GSIs) with a strong U.S. presence collaborate with Google Cloud to deliver customized solutions and expert services (consulting, implementation, managed services, enterprise data infrastructure, and generative AI [GenAI] and AI services). This collaboration helps enterprises navigate complexity, accelerate cloud adoption and modernization, harness the transformative power of GenAI with platforms such as Gemini and Vertex AI, and achieve tangible business outcomes in an increasingly hybrid cloud and multicloud environment.

U.S. enterprises are actively responding to several major trends influencing their technology investments and cloud service consumption. These trends include embracing hybrid cloud and multicloud strategies for flexibility and optimization; promoting data democratization to empower employees; accelerating cloud-native development to enhance agility; capitalizing on the transformative potential of agentic AI, GenAI, AI and ML, which are currently the top drivers for increasing cloud budgets; and navigating the critical demands related to data security, governance and sovereignty. Consumption patterns show a clear shift toward services that address these needs, extending beyond basic infrastructure. Google Cloud's portfolio, including Gemini, Vertex AI, BigQuery, AI-optimized infrastructure (TPUs, GPUs), GKE and its comprehensive security suite (Mandiant, Chronicle, Security Command Center), directly caters to the needs of these U.S. enterprises. Providers assist U.S. companies, especially in regulated sectors such as finance and healthcare, with critical migrations and data

Google Cloud partners **accelerate innovation** via AI, **unified data, security and expertise.**

modernization projects, prioritizing security and compliance. They are also developing deep industry expertise and acquiring specialized certifications to differentiate their offerings.

The key trends observed in the market are as follows:

Intensifying focus on GenAI and agentic AI via Google Agentspace: GenAI and AI services are rapidly growing in the U.S. As providers help enterprises adopt and scale AI, they guide clients through the AI Journey to assist, augment and transform their operations using Google's AI stack, which includes Gemini models, the Vertex AI platform (Model Garden, Agent Builder, MLOps) and AI-optimized infrastructure such as TPUs and GPUs.

Developing AI agents using platforms such as Agentspace is a key trend, with providers building custom agents and industry solutions. Responsible AI practices remain a critical focus for deployments in the U.S. Driven significantly by major announcements at Google Cloud Next '25, providers are heavily investing in GenAI capabilities. The introduction of the Gemini 2.5 family (Pro and Flash), advancements in multimodal models (Imagen 3, Veo 2, Chirp 3, Lyria), the AI hypercomputer architecture featuring seventh-generation Ironwood TPUs and the enterprise focus on AI agents create immense opportunities for enhanced AI capabilities, intelligent automation, innovation across industries and the creation of new tools and platforms for developers and enterprises. Industry research confirms that AI is the primary driver for increasing cloud budgets. In response, U.S. providers are developing sophisticated solutions and services on the Vertex AI platform to help clients deploy GenAI responsibly and effectively, transforming operations, CX and product innovation.

Transforming data management for enterprises: There is a strong trend toward using AI, including Google's Gemini models, which are integrated into migration tools and partner solutions to automate complex tasks such as code translation, schema mapping, data validation and dependency analysis. Enterprises are moving away from siloed data systems toward unified platforms that handle diverse data types and workloads. This shift is leaning toward more autonomous data management, where AI assists with tasks such as performance tuning, cost optimization recommendations, anomaly detection in pipelines and even natural language querying. Tools such as Dataplex and sovereign cloud solutions are gaining traction as they provide a comprehensive method to discover, manage, secure and govern data across BigQuery, Cloud Storage and databases.

Increasing Google Cloud VMware Engine (GCVE) adoption amid VMware licensing changes: The market is witnessing a substantial increase in enterprise adoption of GCVE. This trend is fueled by market disruption following Broadcom's acquisition of VMware and the subsequent overhaul of its licensing model. GCVE presents a compelling, stable and cost-efficient alternative for U.S. enterprises impacted by these changes. It allows organizations to migrate VMware environments to Google Cloud rapidly, maintain operational consistency using familiar tools, avoid immediate hardware refreshes and integrate with Google Cloud's native services. Providers are capitalizing on this by building robust GCVE migration practices, further validated by Broadcom's significant migration of VMware workloads to Google Cloud.

Migrating Oracle workloads on Google Cloud: Data modernization is essential for AI readiness and remains a core focus for organizations. Within this context, migrating Oracle workloads to the Google Cloud is a prominent trend that is gaining significant traction. The groundbreaking multicloud partnership between Oracle and Google Cloud, announced in June 2024, dramatically accelerates this trend. Oracle Database@Google Cloud allows the Oracle Exadata Database Service and Autonomous Database to run directly within Google Cloud data centers on OCI hardware, providing customers direct, low-latency access to these managed Oracle services integrated within their Google Cloud environment. Oracle interconnect for Google Cloud and simplified procurement of Oracle services directly through Google Cloud Marketplace are other enablers of this trend. Providers are actively helping U.S.

clients leverage these options to modernize while optimizing costs, including utilizing Bring Your Own License (BYOL) where applicable.

Defining complex Google Cloud modernizations with data, AI and cloud-native technologies: As multicloud implementations become increasingly prevalent in the U.S., providers offering thorough readiness, TCO and ROI assessments, clear road maps, optimal architecture design and strategic migration planning are increasingly sought-after. GSIs play a crucial role by providing essential advisory services to effectively design, secure and manage these complex environments. Key modernization trends on Google Cloud fueling this demand include moving beyond simple lift-and-shift to replatforming applications onto containers using Google Kubernetes Engine (GKE) or rearchitecting for cloud-native services such as Cloud Run. There is also a significant focus on migrating and modernizing legacy data warehouses (such as Teradata and Netezza) and databases (including SAP HANA and Oracle) to scalable platforms such as BigQuery and Cloud SQL/Alloy DB to enable advanced AI and analytics. Organizations are also increasingly leveraging AI-driven tools for assessment, planning and accelerating these complex transitions.

Optimizing cloud operations with automation, FinOps and unified management: Managed service providers increasingly leverage automation and AIOps to provide proactive monitoring, predictive maintenance, automated incident response and continuous optimization, reducing manual effort and improving reliability. As cloud spending grows, FinOps becomes critical. Managed services providers offer expertise and tools for cost monitoring, analysis, optimization, budgeting, forecasting and implementing showback and chargeback models, helping clients maximize the value of their cloud investments. The complexity of hybrid cloud and multicloud environments necessitates service providers skilled in integrating, managing and securing workloads across diverse platforms, ensuring consistent policies and operational control. Centralized discovery and management tools are key enablers. Integration with enterprise ITSM platforms like ServiceNow streamlines workflows, provides IT teams with a more unified view and control plane and manages cloud resource alerts and service requests.

Increasing demand for advanced AI expertise: Deep expertise has become crucial for integrating advanced multimodal AI capabilities, multiagent systems, Google Agentspace and open protocols such as Agent2Agent into core enterprise processes for rich insights and interactions. Partners possessing advanced GenAI expertise are essential for architecting, building and managing next-generation AI transformations on Google Cloud. Developing highly specialized, vertical-specific AI solutions (e.g., for finance, healthcare, manufacturing) that require deep domain knowledge combined with AI proficiency is a key growth area.

U.S. enterprises rely on Google Cloud partners to navigate hybrid cloud and multicloud complexities, ensure security and implement high-value Google Cloud services such as Gemini, Vertex AI and BigQuery. Key partner focus areas include accelerating GenAI and agentic AI adoption, modernizing data estates, delivering industry-specific outcomes and enabling robust governance and FinOps practices, all driven toward maintaining their competitive edge.

Provider Positioning

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	Google Cloud Professional Services (Consulting and Migration)	Google Cloud Managed Services	Google Cloud Enterprise Data Infrastructure Services	Google Cloud GenAI and AI Services
66degrees	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Accenture	Leader	Leader	Leader	Leader
Atos Group	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Brillio	Not In	Not In	Contender	Contender
Capgemini	Leader	Leader	Leader	Leader
Cognizant	Leader	Leader	Leader	Leader
Deloitte	Leader	Leader	Leader	Leader
Devoteam G Cloud	Product Challenger	Product Challenger	Not In	Not In
DXC Technology	Product Challenger	Rising Star ★	Product Challenger	Product Challenger
Fractal Analytics	Not In	Not In	Product Challenger	Product Challenger

Provider Positioning

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	Google Cloud Professional Services (Consulting and Migration)	Google Cloud Managed Services	Google Cloud Enterprise Data Infrastructure Services	Google Cloud GenAI and AI Services
Genpact	Leader	Not In	Leader	Leader
GFT	Product Challenger	Not In	Product Challenger	Product Challenger
Grid Dynamics	Contender	Contender	Contender	Contender
HCLTech	Leader	Leader	Leader	Leader
Hexaware	Rising Star ★	Not In	Rising Star ★	Rising Star ★
IBM	Market Challenger	Market Challenger	Market Challenger	Market Challenger
Infogain	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Infosys	Market Challenger	Market Challenger	Market Challenger	Market Challenger
Innova Solutions	Product Challenger	Not In	Product Challenger	Product Challenger
Kyndryl	Product Challenger	Product Challenger	Product Challenger	Product Challenger

Provider Positioning

	Google Cloud Professional Services (Consulting and Migration)	Google Cloud Managed Services	Google Cloud Enterprise Data Infrastructure Services	Google Cloud GenAI and AI Services
LTIMindtree	Leader	Leader	Leader	Leader
Mphasis	Rising Star ★	Product Challenger	Rising Star ★	Rising Star ★
NTT DATA	Product Challenger	Rising Star ★	Not In	Not In
Persistent Systems	Leader	Leader	Leader	Leader
PwC	Leader	Not In	Leader	Leader
Pythian	Contender	Contender	Contender	Contender
Quantiphi	Leader	Product Challenger	Leader	Leader
Rackspace Technology	Leader	Leader	Leader	Leader
Slalom	Contender	Not In	Contender	Contender
SoftServe	Contender	Not In	Product Challenger	Product Challenger

Provider Positioning

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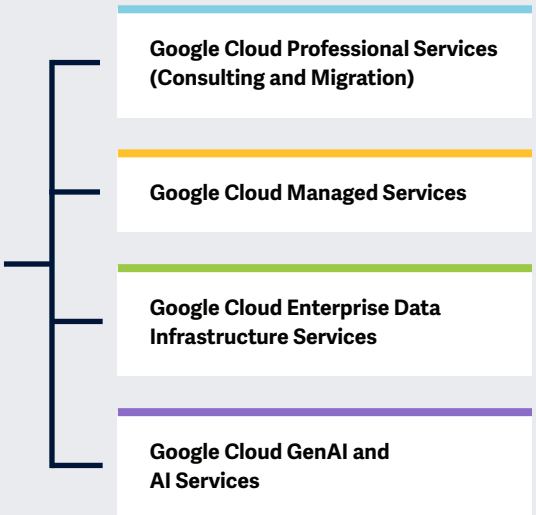
	Google Cloud Professional Services (Consulting and Migration)	Google Cloud Managed Services	Google Cloud Enterprise Data Infrastructure Services	Google Cloud GenAI and AI Services
TCS	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Leader	Leader	Leader
Virtusa	Product Challenger	Product Challenger	Product Challenger	Product Challenger
VVDN Technologies	Not In	Product Challenger	Not In	Product Challenger
Wipro	Leader	Leader	Leader	Leader

Key focus areas of the **Google Cloud Partner Ecosystem** 2025 study.

Simplified Illustration Source: ISG 2025



Definition

In 2024, Google Cloud made significant strides in improving its platform, introducing a series of advancements and innovations that solidified its position as a leader in the cloud computing space. From AI advancements and enhanced security to a robust multicloud strategy, Google Cloud remains committed to empowering businesses through cutting-edge technologies while delivering scalable and sustainable solutions.

At the forefront of these advancements is the integration of generative AI (GenAI), which has transformed the way businesses interact with data and build applications. Google Cloud has introduced powerful GenAI tools, such as Gemini, that enable organizations to create, refine and deploy content and applications with unprecedented efficiency. These tools incorporate sophisticated natural language processing capabilities that support the development of enterprise use cases across industries and business functions.

Security remains a top priority for Google Cloud. In 2024, it made significant enhancements in this domain. By leveraging AI for real-time threat detection, Google Cloud can identify potential security breaches more swiftly than ever. Additionally, advanced encryption methods and robust identity management systems ensure the protection of sensitive data amid the ever-evolving landscape of cyberthreats.

Google Cloud has also taken substantial steps toward sustainability, emphasizing its commitment to reducing carbon emissions and promoting sustainable technologies. It has introduced new tools and services to help organizations track and report their carbon footprint, enabling them to align their operations with global sustainability goals.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following four quadrants for services: Google Cloud Professional Services (Consulting and Migration), Google Cloud Managed Services, Google Cloud Enterprise Data Infrastructure Services and Google Cloud GenAI and AI Services.

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

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

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

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 (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.

Google Cloud Professional Services (Consulting and Migration)

Who Should Read This Section

This report is valuable for service providers offering Google Cloud professional services (consulting and migration) in the U.S. to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. This report is relevant to enterprises across the U.S., focusing on assessing advisory, implementation and integration capabilities of service providers to build and migrate services in hybrid and multicloud environments.

Technology professionals

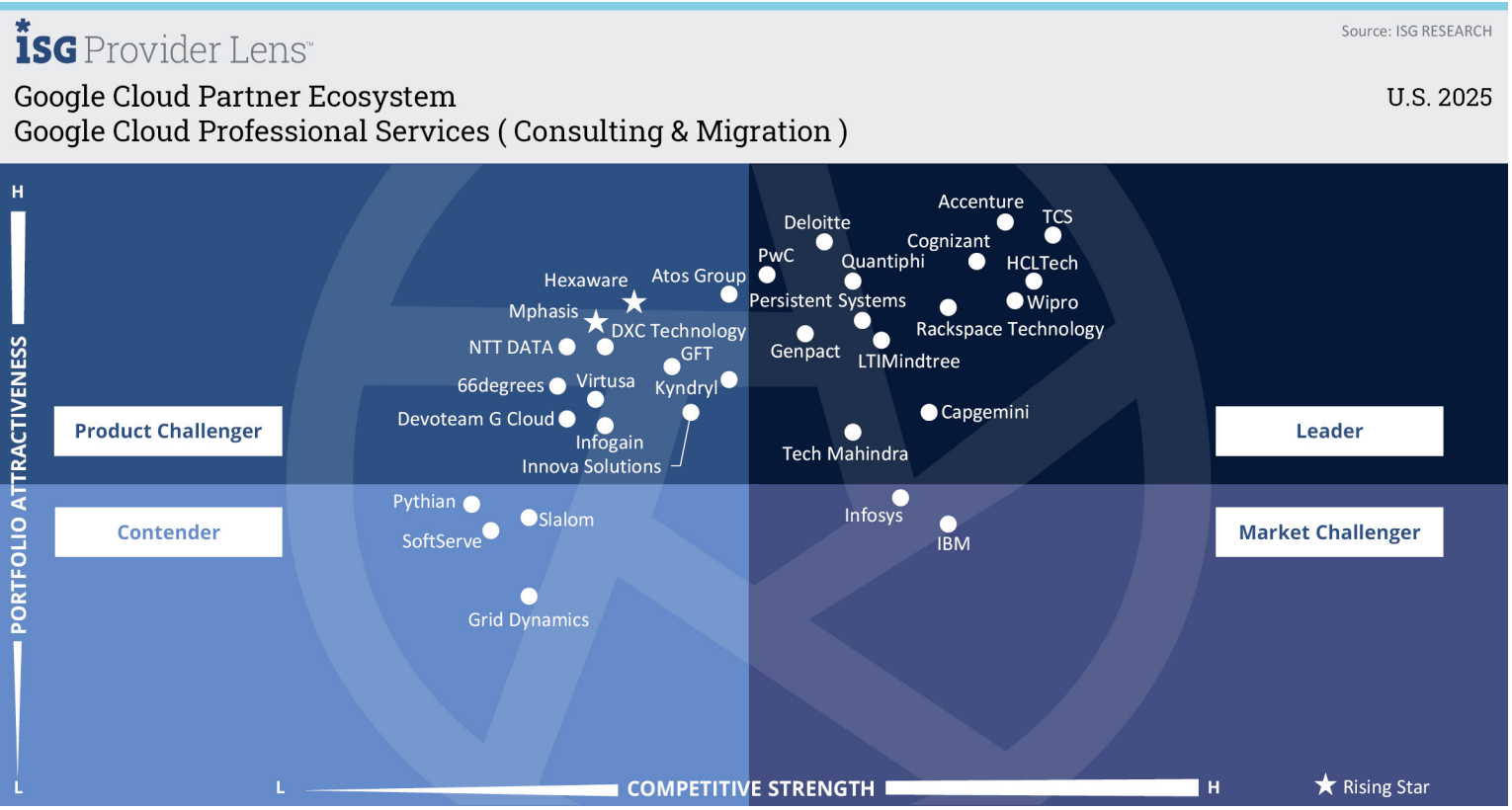
Should read this report to understand service providers' relative positioning and capabilities to effectively utilize Google Cloud's professional services.

Procurement professionals

Should read this report to understand the capabilities of Google Cloud consulting and migration service providers in the U.S. and their competitive advantages.

Digital professionals

Should read this report to understand the positioning of Google Cloud professional service providers and evaluate their impact on clients' ongoing transformation initiatives.



This quadrant assesses providers guiding enterprises through **Google Cloud journeys, from AI-infused strategic planning and TCO analysis to secure migration and modernization,** optimizing cloud utilization and enabling data-driven innovation.

Tapati Bandopadhyay

Google Cloud Professional Services (Consulting and Migration)

Definition

This quadrant evaluates providers offering consulting, migration, implementation and integration services related to Google Cloud. Service providers support enterprises in effectively adopting and implementing Google Cloud solutions. Key evaluation attributes include the development of comprehensive cloud and AI adoption and opportunity assessment strategies tailored to specific industries and aligned with business objectives. Providers are expected to integrate ESG principles and governance, risk and compliance (GRC) considerations into their strategies for sustainable operations. Proficient design of scalable and secure architectures and the ability to leverage cloud, data and AI for intelligent operations are essential. Expertise in migrating data and AI workloads, minimizing disruptions and enabling hybrid environments via Google's Anthos platform is crucial.

Eligibility Criteria

1. Have a robust team of certified Google Cloud professionals, with expertise in **architecture, migration, multicloud integration (Anthos), and AI and ML solutions**
2. Offer comprehensive Google Cloud adoption strategies, including **maturity assessments, road maps and transformation plans,** tailored to diverse industry verticals
3. Deploy and manage **hybrid and multicloud environments using Google Cloud's Anthos platform,** ensuring seamless integration and operational consistency
4. Execute **large-scale application and data migrations** to Google Cloud with minimal business disruption and adherence to best practices
5. Design and implement scalable, secure and integrated architectures leveraging **Google Cloud's compute, storage, networking and data services**
6. Integrate **ESG** considerations and **GRC** frameworks into their service delivery
7. Showcase a strong portfolio of AI and ML-driven innovations, including expertise in deploying **GenAI and modernizing enterprise workloads** for operational efficiency

Observations

Google Cloud service providers are increasingly offering verticalized solutions, allowing businesses in sectors such as finance, healthcare, manufacturing and retail to adopt Google Cloud in a way that effectively addresses their unique operational challenges, regulatory requirements and business goals. Additionally, there is an increased migration to GCVE and Oracle workloads to Google Cloud, as organizations seek compliant cloud solutions for these environments.

Some of the trends observed in this quadrant are as follows:

Deep technical expertise across the Google Cloud stack: Service providers offer a wide array of technical services spanning Google Cloud's infrastructure, platform and application layers. These services include expertise in designing and implementing hybrid cloud and multicloud solutions (Anthos), building robust data analytics platforms (BigQuery, Dataproc), deploying scalable applications (Compute Engine, GKE) and managing various database services (Cloud SQL, Cloud Spanner).

Utilization of GenAI-powered tools and services: Service providers are adept at using tools such as Gemini Code Assist to enhance developer productivity, automate code generation and streamline the software development lifecycle. These services include prompt engineering, fine-tuning GenAI models for specific use cases and integrating GenAI capabilities into applications to create innovative UX.

Increased demand for consulting services: The demand for modernization consulting has surged due to the need for increased agility, scalability and cost-efficiency in the cloud, advising on application refactoring, containerization (GKE) and serverless adoption.

From the 35 companies assessed for this study, 32 qualified for this quadrant, with 14 being Leaders and two Rising Stars.

accenture

Accenture drives cloud transformation by integrating Google Cloud professional services with deep industry solutions, GenAI innovation, platform modernization and intelligent workflows, helping enterprises achieve scalable, resilient operations globally.

Capgemini

Capgemini strengthens Google Cloud professional services by combining intelligent cloud modernization, GenAI innovation and domain-specific solutions. This approach enables enterprises to accelerate transformation while improving agility and sustainability.

cognizant

Cognizant enables enterprises to reimagine operations with Google Cloud professional services, leveraging AI engineering, cloud-native modernization, multiagent GenAI frameworks and industry-specific accelerators for enhanced digital resilience and scalability.

Deloitte.

Deloitte transforms enterprise operations through Google Cloud professional services, focusing on regulatory compliance, industry-specific AI innovations, intelligent cloud-native development and secure data platforms for rapid, trusted digital modernization.

Genpact drives Google Cloud adoption with data-led transformation, AI-first industry solutions, regulatory compliance and scalable frameworks, helping regulated industries enhance operations, CX and risk management in highly competitive markets.

HCLTech accelerates digital transformation with Google Cloud professional services by combining AI-powered modernization, site reliability engineering (SRE)-driven automation, intelligent security frameworks and domain-specific cloud solutions for operational agility, resilience and scalability.

LTIMindtree modernizes enterprise operations with Google Cloud professional services, leveraging AI-driven platforms, FinOps governance, multicloud expertise, digital resilience strategies and sustainable innovation to fuel intelligent, future-proof enterprise growth.

Persistent Systems transforms cloud operations with Google Cloud professional services, integrating DevSecOps, FinOps, MLOps, AI-driven optimization platforms and regulatory compliance frameworks for resilient, intelligent and cost-optimized enterprise modernization.

PwC enables enterprises to achieve cloud transformation with Google Cloud professional services, combining cybersecurity expertise, GenAI-driven digital innovation, regulatory compliance and domain-specific digital acceleration strategies for operational excellence.

Quantiphi supports cloud-native transformations with Google Cloud professional services, focusing on AI-first solutions, domain-specific accelerators, intelligent automation, predictive analytics and rapid industry-scale innovation to drive scalable digital success.

Rackspace Technology enhances digital transformation with Google Cloud professional services, offering cloud-native modernization, proactive cloud engineering, round-the-clock support, FinOps-driven operational optimization and intelligent workload scalability for enterprises.

TCS drives cloud modernization through Google Cloud professional services, combining AI-powered automation, FinOps excellence, data platform innovation, sustainable transformation and industry-specific cloud architectures for scalable, resilient enterprises worldwide.

Google Cloud Professional Services (Consulting and Migration)

Tech Mahindra advances enterprise transformation through Google Cloud professional services, combining hyperautomation, cognitive AI solutions, resilient hybrid cloud frameworks, regulatory compliance solutions and accelerated business agility at scale.

Wipro transforms digital operations through Google Cloud professional services, leveraging GenAI automation, multicloud intelligence, SRE-led resilience, FinOps frameworks and cybersecurity-first modernization to accelerate enterprise cloud transformations globally.

Hexaware (Rising Star) modernizes cloud environments with Google Cloud professional services, focusing on automation-first application modernization, AI-driven optimization platforms, rapid database migration and scalable enterprise transformation journeys across industries.

Mphasis (Rising Star) accelerates cloud transformations with Google Cloud professional services. It combines AI-first digital frameworks, Anthos hybrid cloud modernization, intelligent compliance automation and industry-specific cloud-native platforms for enhanced agility and scalability.

Leader

"PwC drives cloud transformation with Google Cloud through strategic AI integrations, advanced technology accelerators and a comprehensive approach to SecOps modernization, establishing itself as a leading innovator in Google Cloud solutions."

Tapati Bandopadhyay

PwC

Overview

PwC is headquartered in London, U.K. It has more than 370,300 employees across 149 countries. In FY24, the company generated $55.4 billion in revenue, with Advisory as its largest segment. PwC focuses on cybersecurity, digital trust and industry-specific cloud transformation. Its services include security operations (Chronicle SIEM/ SOAR), AI-powered compliance solutions and ESG data modernization programs, among many. PwC integrates intelligent agents, health data engines and financial data hubs for regulated sectors. It accelerates cloud adoption for U.S. industries by combining robust security governance with GenAI innovations and intelligent data platforms.

Strengths

AI-driven innovation with deep Google Cloud integration: PwC offers AI-powered business transformation through innovative initiatives such as Google Cloud AI Experience Zones, agent accelerators, agent OS, offerings around Google Agentspace and Healthcare Agent Workbench. Its expertise in AI governance, coinnovation with Google Cloud for healthcare transformation, tax compliance for real-time reporting, AI security tools and PwC Code Intelligence showcases its commitment to advanced, secure and industry-wide AI adoption.

Strategic cloud transformation: PwC drives cloud-powered business transformation with strategic model reinvention, addressing evolving market dynamics and customer needs. It offers specialized healthcare, finance and retail solutions, combining deep industry knowledge with technology stacks. For example, its Google Cloud-based tax compliance platform streamlines reporting, identifies potential issues and manages complex calculations.

Advanced cloud adoption accelerators: PwC's technology accelerators on Google Cloud comprise the AI Agents Library, which offers prebuilt AI agents and workflows for rapid deployment and a robust ML model development toolkit that supports diverse industry applications. Its cloud-in-a-box solution automates cloud adoption with secure landing zones, CI/CD automation and migration tools.

Caution

PwC's success in driving innovation through advanced cloud technologies and AI hinges on strong collaboration with hyperscalers, continuous feedback and ongoing adaptation to address evolving industry challenges. Sustained effort is crucial to ensure its solutions remain relevant and effective in this dynamic landscape.

Google Cloud Managed Services

Who Should Read This Section

This report is valuable for service providers offering Google Cloud managed services in the U.S. to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers and examines how each addresses key challenges associated with offering managed services in the Google Cloud ecosystem. It also shows global system integrators' capabilities to provide comprehensive multicloud management strategies and platforms to ensure security, governance and cost control across diverse cloud environments.

Technology professionals

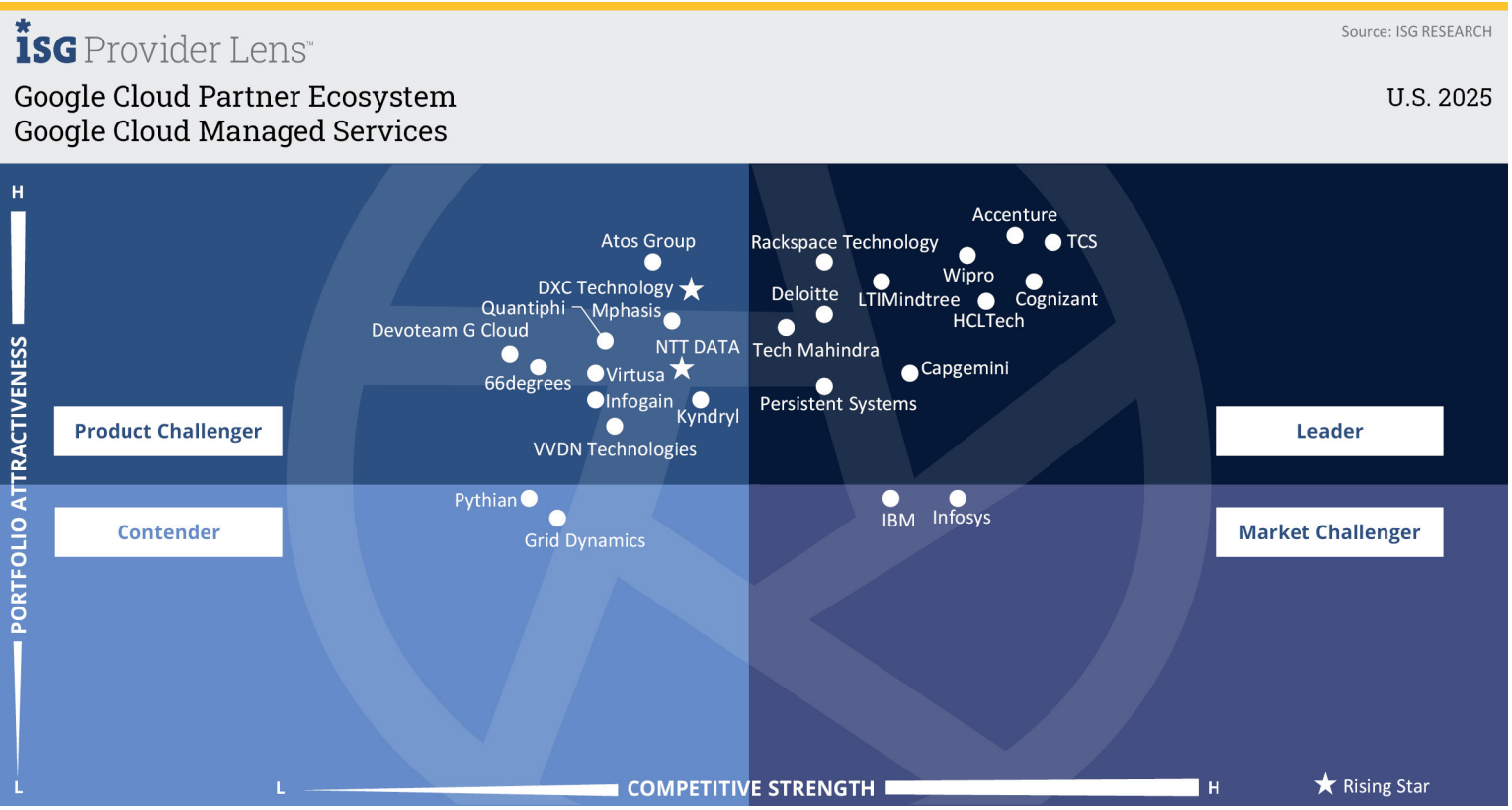
Should read this report to understand providers' relative positioning and capabilities in offering Google Cloud managed services and assess their own standing.

Digital professionals

Should read 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 evaluates service providers **operating and optimizing Google Cloud and hybrid estates,** focusing on leveraging **AIOps for proactive management, FinOps and ensuring unified governance** across diverse platforms.

Tapati Bandopadhyay

Definition

This quadrant assesses providers offering managed public cloud services to augment Google's built-in capabilities, including IaaS and PaaS. These services include orchestration, provisioning, real-time and predictive analytics, and management of public cloud and multicloud environments. Providers offer customers significant levels of automation and transparency over the managed cloud resource pool using specially developed or licensed cloud management platforms (CMPs) and tools. SLAs for managed services encompass a wide range of offerings to drive business value, including data management and governance, ML capabilities, and ESG and sustainability tools and assets. Providers boast teams with Google Cloud-native skills, including cloud-native operations, site reliability engineering (SRE) and platform reliability engineering (PRE). They also integrate practices such as DataOps, ModelOps, MLOps, AIOps and CloudFinOps. Google Cloud managed service providers leverage innovative intellectual property such as FinOps methodologies, automation systems, and frameworks for security, compliance and governance to enhance resilience.

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. Expertise in **authentication and access management** technologies and Google's SRE principles
4. Experience in **designing and operating platforms** for highly segregated data workloads across hybrid and multicloud systems, especially for regulatory compliance
5. Offer **cloud-native application** development and microservices
6. Experience in **API** automation, data science, AI and ML
7. Ability to measure and optimize **cloud-related carbon emissions** on Google Cloud

Observations

Cloud operations and management have become essential and non-negotiable elements of any enterprise cloud transformation strategy. The continuous expansion of the Google Cloud portfolio across diverse technology domains has prompted enterprises to embrace and deepen their engagement with Google Cloud.

Some of the trends observed in this quadrant are as follows:

Focus on automation and DevOps: Providers are establishing automated CI/CD pipelines, that seamlessly integrate with existing DevOps ecosystems to accelerate software delivery and enhance reliability, coupled with extensive infrastructure automation through infrastructure as code (IaC). Comprehensive monitoring and observability solutions provide critical insights into application performance and infrastructure health through robust alerting, insightful dashboards and efficient root cause analysis capabilities.

Emphasis on sustainability and ESG services: Recognizing the increasing significance of environmental stewardship in the U.S., GSIs are providing solutions for data-driven sustainability reporting, carbon footprint tracking and optimizing, and promoting sustainable infrastructure. This approach ensures that Google Cloud adoption in the U.S. aligns with growing corporate responsibility initiatives, investor expectations and evolving regulatory landscapes.

Maximization of cloud investment returns: GSIs strategically leverage Google Cloud's comprehensive suite of cost management tools, such as the Cost Management and Pricing Calculator, alongside its specialized offerings for intelligent resource right-sizing recommendations and automating cost-saving measures. Providers are investing significantly in their FinOps tools to assist enterprises in monitoring costs and resources.

From the 35 companies assessed for this study, 26 qualified for this quadrant, with 11 being Leaders and two Rising Stars.

accenture

Accenture empowers enterprises with managed services that drive hybrid cloud and multicloud agility. It leverages automation and GenAI tools to fast-track modernization, enhance security resilience and achieve rapid reinvention outcomes for future-ready operations.

Capgemini

Capgemini transforms enterprises into innovation hubs with its managed services, modernizing IT ecosystems, reducing operational costs and accelerating cloud-driven agility with AI-powered tools and sector-specific frameworks.

cognizant

Cognizant brings a 360-degree managed services approach that combines security, application modernization, FinOps and sustainability frameworks. This approach enables enterprises to achieve operational agility and cost governance across Google Cloud ecosystems.

Deloitte.

Deloitte delivers secure and scalable Google Cloud services by embedding compliance-driven frameworks, modular risk management tools and credentialing solutions. It helps enterprises strengthen trust, regulatory resilience and operational agility across hybrid environments.

HCLTech drives intelligent cloud operations through AIOps-led managed services, FinOps for cost optimization, site reliability engineering (SRE) practices and security-first frameworks, supporting rapid, resilient transformations on Google Cloud.

LTIMindtree enhances managed services with AI-driven automation, FinOps governance, multicloud management and its Infinity Ensure frameworks, simplifying operations, improving resilience and boosting operational excellence across Google Cloud and hybrid environments.

Persistent Systems delivers agile, AI-driven managed services, focusing on FinOps, DevSecOps and CloudOps automation to empower enterprises with intelligent, resilient Google Cloud operations and enhanced scalability.

Rackspace Technology simplifies cloud modernization with resilient managed services, leveraging proactive optimization, round-the-clock support and FinOps-driven governance across hybrid cloud and multicloud environments and customizable SLAs.

TCS empowers enterprises with a machine-first managed services model, enhancing reliability, resilience, FinOps maturity, sustainability transformations and hybrid-cloud agility on Google Cloud with predictive analytics.

Tech Mahindra advances cloud-managed services by combining hyperautomation, cognitive AI platforms and robust IT operations to boost agility, security, cost efficiency and domain-specific capabilities across Google Cloud ecosystems.

Wipro elevates managed services with GenAI-driven automation, multicloud operational intelligence, integrated security, FinOps frameworks and site reliability engineering (SRE)-driven resilience, enabling enterprises to maximize Google Cloud agility, governance and ROI.

DXC Technology (Rising Star) delivers managed services by combining intelligent governance, predictive analytics, FinOps optimization and platform-driven resiliency. These services help enterprises achieve secure, agile and cost-efficient operations across hybrid Google Cloud settings.

NTT DATA

NTT DATA (Rising Star) drives cloud excellence with AI-powered automation, proactive security, FinOps optimization, industry-specific solutions and predictive analytics, helping enterprises modernize, reduce costs and strengthen operational resilience on Google Cloud.

Google Cloud Enterprise Data Infrastructure Services

Who Should Read This Section

This report is valuable for service providers offering Google Cloud enterprise data infrastructure services in the U.S. to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings in the enterprise data ecosystem and capabilities in insights and decision-making. The focus is on how global system integrators cater to organizations seeking comprehensive data management solutions to analyze large volumes of information from cloud services.

Technology professionals

Should read this report to explore providers' relative positioning and capabilities for effectively utilizing Google Cloud enterprise data infrastructure services.

IT compliance officers

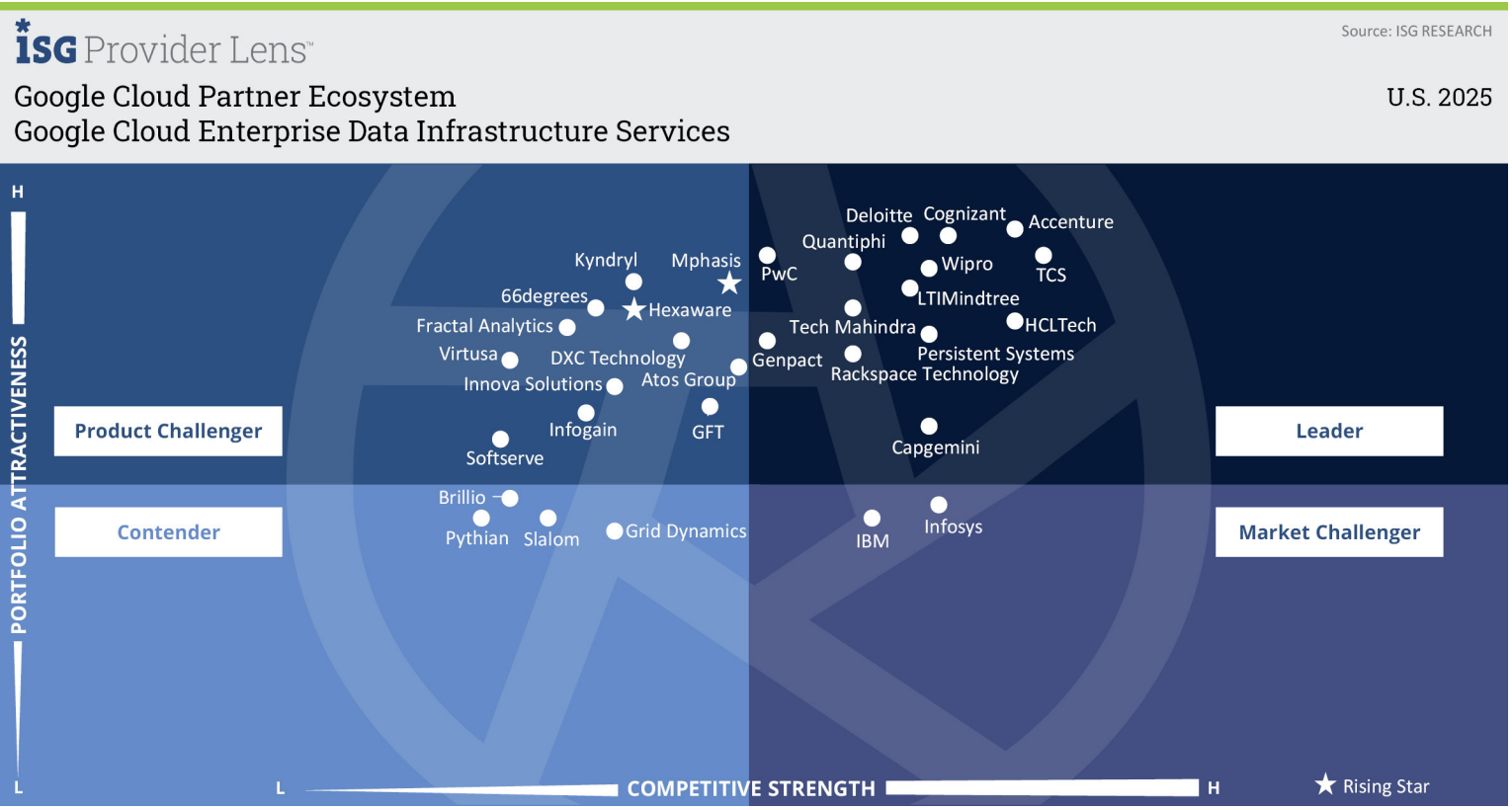
Should read this report to understand how Google Cloud enterprise data infrastructure services ensure compliance with industry regulations for safeguarding enterprise information.

Procurement professionals

Should read this report to learn about providers offering Google Cloud enterprise data infrastructure services in the U.S. and understand their competitive advantages.

Digital professionals

Should review this report to understand how providers' Google Cloud enterprise data infrastructure services influence enterprises' ongoing transformation.



This quadrant assesses **providers modernizing enterprise data on Google Cloud.** It **highlights AI-driven migrations** to unified platforms such as BigQuery, emphasizing robust data governance and the **preparation of data for advanced analytics and AI applications.**

Tapati Bandopadhyay

Definition

This quadrant is a benchmark for evaluating providers based on their offerings in the enterprise data ecosystem and insights and decision-making domains. Within the enterprise data ecosystem domain, providers are assessed on their ability to deliver big data platforms, including BigQuery, enabling seamless data integration and AI readiness. Key attributes include scalability and performance to meet growing business demands and effectively manage workloads. Additionally, data sovereignty is crucial for ensuring compliance with regulatory frameworks while optimizing resource allocation. In the insights and decision-making domain, service providers are evaluated based on their capabilities to enable actionable intelligence.

The capabilities include leveraging predictive analytics for strategic foresight, creating dashboards and real-time insights for operational agility, and offering hyperpersonalization to drive customer engagement and satisfaction.

Eligibility Criteria

1. Deep technical expertise in Google Cloud solutions, including BigQuery, Cloud SQL and Dataflow
2. Ability to implement scalable solutions that optimize data performance for handling high-volume workloads
3. Showcase robust workload management practices while adhering to data sovereignty regulations, enabling enterprises to maintain compliance across geographic and industry-specific requirements
4. Experience in seamless data integration, transformation and real-time processing
5. Ability to deliver predictive analytics
6. Expertise in creating interactive dashboards and enabling real-time insights
7. Expertise in delivering hyperpersonalization solutions

Observations

Enterprises are increasingly seeking scalable, high-performance and cost-effective solutions to manage their growing data volumes and derive actionable insights from their data. GSIs focus on prebuilt tools, methodologies and frameworks designed to automate and streamline the migration process. This includes features such as automated data discovery, schema conversion tools and intelligent data ingestion. GSIs utilize key Google Cloud offerings, including BigQuery, Cloud Spanner and Cloud Storage, for data migration, integration and analysis, while focusing on data governance. They also work to optimize clients' data infrastructure costs by providing customized enterprise data solutions that minimize unnecessary expenses.

Some of the trends observed in this quadrant are as follows:

Focus on workload management and data sovereignty: GSIs assist enterprises in migrating and managing diverse workloads, while ensuring data sovereignty and compliance. This includes implementing solutions that adhere to regional regulations and provide granular control over data access. In the U.S., this often involves helping financial institutions in meeting regulatory requirements such as the CCPA and GLBA.

Demand for scalable data solutions: GSIs leverage BigQuery and Cloud SQL to build data warehouses and databases that can handle massive data volumes and complex queries. They implement solutions that offer real-time analytics and low-latency access, which are crucial for data-driven decision-making.

Emphasis on generating real-time insights: GSIs are developing solutions that provide real-time insights from streaming data using services like Dataflow. This empowers businesses to respond quickly to changing conditions and make timely decisions. U.S. businesses, especially in sectors like retail and e-commerce, are keen to leverage real-time data for personalized CX.

From the 35 companies assessed for this study, 32 qualified for this quadrant, with 14 being Leaders and two Rising Stars.

accenture

Accenture drives next-gen enterprise data modernization by combining cloud-first strategies, intelligent automation and platform engineering to deliver scalable, secure and future-ready transformations within Google Cloud infrastructure.

Capgemini

Capgemini advances enterprise data transformation by blending modern data strategies, governance frameworks and AI-driven analytics. Its expertise helps it build resilient infrastructures and enhance decision-making through intelligent, scalable and secure cloud-native environments.

cognizant

Cognizant modernizes the enterprise data ecosystem by integrating AI foundations, intelligent pipelines and cloud architectures. This approach helps enterprises achieve scalability, compliance and operational efficiency, facilitating data-led digital transformations.

Deloitte.

Deloitte combines data governance, security frameworks and strategic modernization services to help organizations optimize decision-making, enhance regulatory compliance, and drive scalable growth through resilient and intelligent cloud-native ecosystems.

Genpact drives data modernization, intelligent cloud engineering and analytics transformation on Google Cloud, enabling operational agility, real-time insights and regulatory compliance that help enterprises unlock their data assets.

HCLTech harnesses Google Cloud to deliver cloud-native migrations, ethical data governance, and scalable architecture modernization, helping enterprises build intelligent platforms that enhance performance, agility and long-term digital resilience.

LTIMindtree accelerates enterprise modernization on Google Cloud through agile migrations, metadata governance and cost-optimized operations, enabling intelligent, scalable infrastructures that support better decision-making, operational efficiency and compliance.

Persistent Systems modernizes data ecosystems on Google Cloud via data warehouse migration, AI-driven analytics and secure governance. This enables faster insights, operational efficiency, and scalable, compliant infrastructures tailored to industry needs.

PwC transforms enterprise data on Google Cloud through modernization, governance and analytics frameworks, enabling scalable insights, operational excellence and compliance to drive informed, data-driven decision-making.

Quantiphi strengthens data foundations on Google Cloud with resilient architecture, governed data lakes and scalable analytics, helping businesses streamline insights, drive automation and build AI-enabled infrastructures aligned with industry goals.

Rackspace Technology drives digital transformation on Google Cloud with resilient architectures, intelligent migration and FinOps-optimized infrastructures, enabling scalable performance, compliance and agile business expansion.

TCS redefines data modernization on Google Cloud with machine-first automation, FinOps excellence and intelligent governance, delivering scalable, secure cloud-native platforms optimized for industry-specific transformation and digital agility.

Tech Mahindra drives data-driven transformation on Google Cloud through agile migration, intelligent security and scalable modernization, delivering resilient, cost-optimized data ecosystems for sustained digital innovation.

Wipro modernizes data platforms on Google Cloud with GenAI-driven automation, intelligent governance and multicloud resilience, helping businesses achieve cost-optimized, secure and scalable infrastructures aligned with their strategic goals.

Hexaware (Rising Star) modernizes enterprise data on Google Cloud with automation-first approaches, intelligent governance and hybrid cloud strategies, enabling agile, secure and cost-optimized infrastructures for rapid digital transformation.

Mphasis (Rising Star) enables enterprise data transformation on Google Cloud through AI-driven modernization, intelligent data engineering and scalable governance, helping build resilient, future-ready infrastructures across complex multicloud environments.

Leader

"The Google Cloud-powered data value acceleration framework from PwC provides a modern data solution designed to transform data into a competitive advantage for clients."

Tapati Bandopadhyay

PwC

Overview

PwC is headquartered in London, U.K. It has more than 370,300 employees across 149 countries. In FY24, the company generated $55.4 billion in revenue, with Advisory as its largest segment. PwC's Google Cloud data modernization services enable enterprises to connect fragmented data, strengthen governance and activate AI- and ML-driven insights. Its frameworks help clients improve operational efficiency, ensure compliance and realize strategic value. In the U.S., PwC partners with businesses across the retail and CPG, industrial, financial services, healthcare and technology, media and telecom sectors to deliver unified and agile cloud data infrastructures.

Strengths

Data monetization with Google Cloud: PwC helps client teams overcome critical data challenges related to AI, such as data fragmentation, poor data quality, insufficient governance and limited accessibility, which can undermine the foundation for a successful data monetization strategy.

Data value acceleration framework: PwC's data value acceleration framework, powered by Google Cloud, provides a modern solution to transform data into a competitive advantage. The framework is built on five pillars: data modernization, data management for trust, security-focused AI, operational efficiency through AI and ML, and data monetization to unlock new revenue streams. This comprehensive approach can effectively transform client businesses with trust and confidence, leveraging tools such as BigQuery, Dataproc, Dataplex, Vertex AI, Gemini and Agentspace.

High-trust data platform with Vertex AI: For instance, PwC collaborated with a leading U.S. healthcare provider to develop an innovative oncology data platform using Google Cloud, Vertex AI and Google's Healthcare Data Engine 2.0. This platform efficiently ingests oncology data and converts it into the healthcare industry standard, Fast Healthcare Interoperability Resources (FHIR) format. It also enables data monetization and physician- and patient-facing AI capabilities.

Caution

PwC has taken a leading role in enabling data monetization capabilities for its clients in a strategic first-mover manner. The company needs to communicate this business case approach, which sets an industry standard, as a key area of practice leadership in partnership with Google Cloud as the data services platform in the U.S. market.

Google Cloud GenAI and AI Services

Who Should Read This Section

This report is valuable for service providers offering Google Cloud GenAI and AI services in the U.S. to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. This quadrant emphasizes the provider's capabilities in two crucial domains — GenAI (Google Gemini) and tailored AI and ML solutions, and their integration with existing enterprise systems to create robust AI-driven solutions.

Technology professionals

Should read this report to learn about the service providers' latest Google Cloud's GenAI and AI services for enterprise-grade configuration, deployment and integration.

Engineering professionals

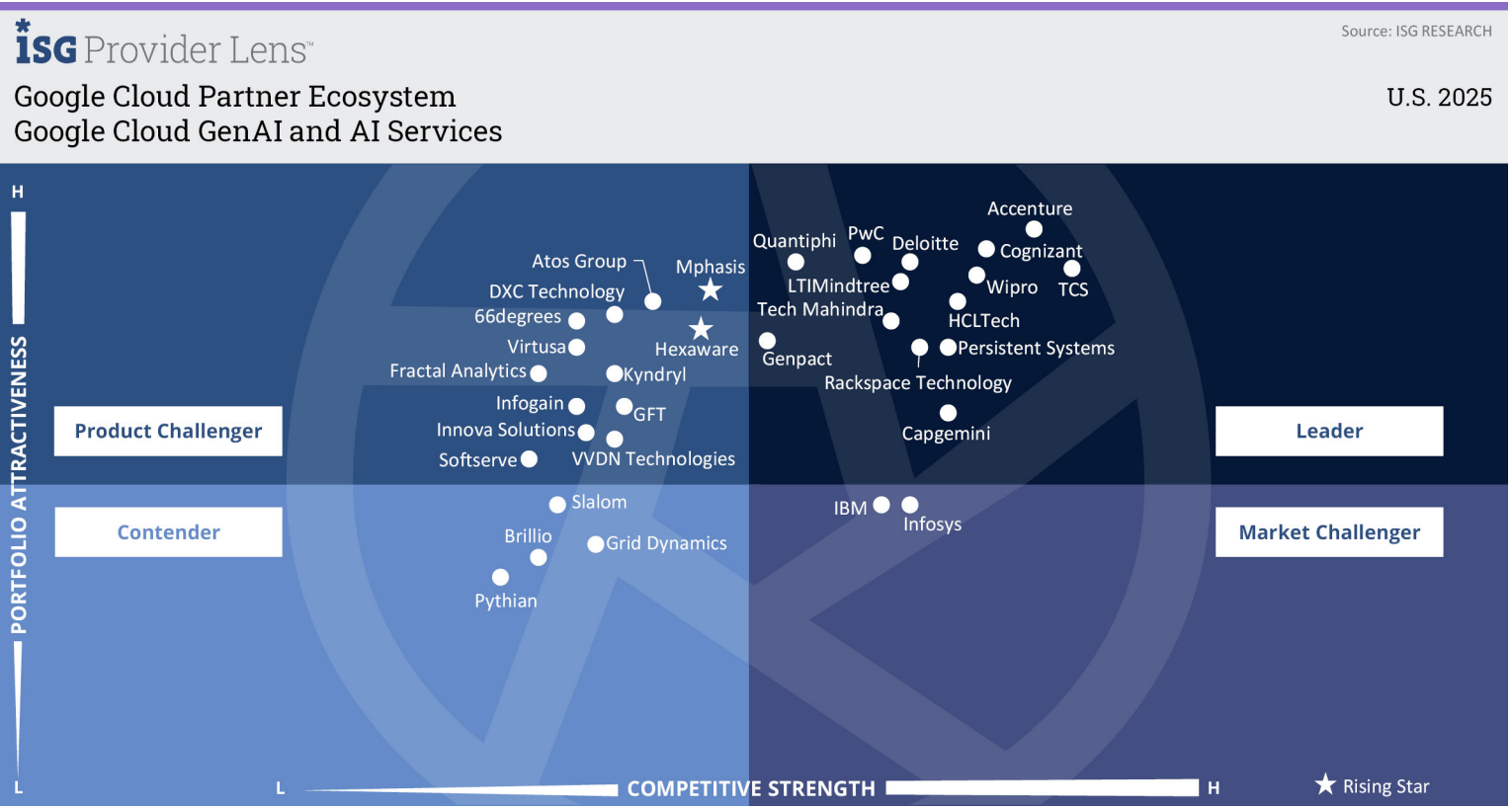
Can read this report to gain insights into leveraging Google Cloud's GenAI models and AI services for building industry-specific accelerators and enhancing cloud integration.

Chief strategy and innovation professionals

Should read this report to understand how Google Cloud's GenAI and AI services support digital transformation and aid innovation.

Product managers

Should read this report to learn how to incorporate Google Cloud's GenAI and AI services into product development lifecycles, driving innovation and enhanced UX.



This quadrant assesses providers enabling **transformative GenAI and AI solutions on Google Cloud, from strategy to deploying advanced agents and multimodal AI,** focusing on **vertical expertise and responsible AI.**

Tapati Bandopadhyay

Definition

This quadrant evaluates service providers based on their offerings in two key areas: GenAI (Google Gemini) and customized AI and ML solutions, highlighting their ability to deliver enterprise-grade, secure AI solutions. In the GenAI space, providers are assessed on their ability to leverage responsible GenAI practices, ensuring ethical and bias-free AI applications. Their expertise in Google's large language model (LLM) — Gemini — is crucial for driving advanced conversational AI, natural language understanding and multilingual capabilities. Providers should demonstrate relevant GenAI capabilities in using training data, fine-tuning training models and ensuring high response quality. They should also implement different types of RAG models and use efficient generative algorithms beyond transformers. They must also have proficiency in search, retrieval and ranking techniques; content creation, summarization and automation; and reducing hallucination, irrelevance and inaccuracies. Providers offering customized AI and ML solutions are evaluated based on their ability to deliver GRC-aware solutions, address challenges specific to industries such as healthcare, finance and retail, and ensure AI implementations meet enterprise-grade security and compliance standards.

Eligibility Criteria

1. **Expertise in deploying and managing Google Gemini** to deliver advanced conversational AI, multilingual support and content generation capabilities
2. Experience in **optimizing Gemini for diverse business use cases**
3. Exhibit focus on ethical AI development to ensure solutions are free from bias, comply with regulatory standards and align with **Google's guidelines for responsible AI implementation**
4. Ability to build, deliver, maintain and scale **hybrid/mixed-model enterprise LLMs and agentic AI solutions**
5. Showcase a track record of **leveraging multimodal and multimodel GenAI** in search, retrieval, ranking techniques, fine-tuning, RAG developments, content creation, summarization, workflow automation, efficient SLMs and new generative technique applications
6. Ability to implement robust **security and GRC frameworks** to ensure adherence to data privacy regulations across industries
7. Experience in **applying Google Cloud GenAI services** to solve complex business challenges

Observations

The U.S. market is characterized by rapid experimentation and prototyping of the hyperscalers' GenAI and agentic AI solutions across various industries. GSIs are facilitating the adoption of services like Vertex AI for building and deploying ML models and Gemini for GenAI applications. They are developing customized solutions, while ensuring responsible AI practices and addressing governance considerations.

Some of the trends observed in this quadrant are as follows:

Scaling high-impact AI initiatives: GSIs are increasingly leveraging a broad spectrum of Google Cloud's GenAI offerings to address diverse enterprise needs. This includes Vertex AI for building, deploying and scaling custom ML models to enable predictive analytics, NLP and computer vision across various applications — Gemini for advanced use cases like multimodal content generation, code synthesis, and enhanced conversational AI experiences and Agentspace for the development and deployment of AI agents that automate complex tasks. GSIs also assist in fine-tuning models from Model Garden for specific enterprise use cases.

Customized ML solutions: GSIs engineer bespoke ML solutions that encompass models for predictive analytics, NLP and computer vision to address specific business requirements. Significant applications of these tailored capabilities are evident in the U.S. healthcare, finance and manufacturing sectors.

Emphasis on responsible AI: U.S. enterprises are increasingly concerned with ethical considerations and regulatory compliance related to AI, focusing on building trust. GSIs emphasize responsible AI practices, ensuring that solutions are fair, transparent and accountable, which include implementing bias detection mechanisms and explainability tools.

From the 35 companies assessed for this study, 33 qualified for this quadrant, with 14 being Leaders and two Rising Stars

accenture

Accenture revolutionizes business operations by leveraging Google Cloud's GenAI and Vertex AI services, embedding data-driven intelligence, automation and ethical AI frameworks into enterprise workflows and decision-making processes.

Capgemini

Capgemini integrates Google Cloud's GenAI into digital ecosystems to enhance automation, analytics and personalization. Through AI engineering and ethical governance, it helps businesses build intelligent, secure and future-ready solutions across various industries.

cognizant

Cognizant accelerates GenAI transformation on Google Cloud using multiagent frameworks, scalable AI foundations and responsible automation, empowering enterprises to reinvent workflows, optimize operations and embed intelligent decision-making.

Deloitte.

Deloitte drives GenAI adoption on Google Cloud with responsible AI architectures, scalable analytics and industry-specific models, helping enterprises integrate ethical AI to enhance decision-making, automation and digital transformation.

Genpact accelerates innovation by embedding Google Cloud's GenAI into core operations, combining AI-driven analytics, automation and domain intelligence to transform processes, boost decision-making and drive sustainable efficiencies across industries.

HCLTech accelerates AI-driven evolution with Google Cloud's GenAI and ML platforms, integrating automation, insights and domain-specific personalization to enable agile, responsible and scalable digital transformations.

LTIMindtree drives intelligent transformation with Google Cloud's GenAI, integrating automation, secure AI development and cost governance to enhance workflow design, predictive analytics and responsible innovation across business ecosystems.

Persistent Systems embeds Google Cloud's GenAI into decision intelligence, predictive analytics and automation, integrating scalable AI architectures, operational resilience and ethical governance to accelerate digital transformation across key industries.

PwC industrializes GenAI with Google Cloud, combining advanced AI architectures, responsible innovation and domain intelligence to transform insights into action, while embedding scalable AI models into processes with a focus on ethical governance and security.

Quantiphi operationalizes GenAI by creating intelligent ecosystems that incorporate AI automation, decision-making and personalization. This approach focuses on scalable architecture, ethical AI governance and rapid deployment of vertical-specific transformations.

Rackspace Technology accelerates GenAI adoption by building responsible AI infrastructures, automating workflows, and integrating intelligent decision systems to embed scalable AI innovation across business functions, while ensuring governance, security and resilience.

TCS pioneers GenAI transformation on Google Cloud with scalable automation, AI-augmented decision-making and ethical governance, empowering organizations to build resilient, AI-driven models, while accelerating responsible innovation across industries.

Tech Mahindra advances GenAI innovation on Google Cloud with cognitive automation, intelligent personalization and scalable AI governance, empowering enterprises to build agile, ethical and intelligent digital ecosystems that deliver measurable outcomes.

Wipro transforms operations with GenAI on Google Cloud, embedding intelligent automation, multicloud resilience and ethical AI governance to accelerate agility, innovation and sustainable growth across various industries.

Hexaware (Rising Star) drives GenAI innovation in enterprises by integrating automation-led AI frameworks, cognitive automation and ethical AI design. Its solutions facilitate intelligent workflows, real-time insights and scalable personalization across digital business ecosystems.

Mphasis (Rising Star) drives GenAI transformation on Google Cloud with scalable AI innovation, automation-driven modernization and cloud-native architectures, helping enterprises adopt responsible AI and operationalize solutions across regulated and fast-growing industries.

Leader

"PwC's agent OS is the first business transformation-focused solution designed to orchestrate enterprise-grade AI agents across platforms such as Salesforce, Google Cloud, Oracle and Workday."

Tapati Bandopadhyay

PwC

Overview

PwC is headquartered in London, U.K. It has more than 370,300 employees across 149 countries. In FY24, the company generated $55.4 billion in revenue, with Advisory as its largest segment. PwC harnesses Google Cloud's GenAI ecosystem to drive innovation through scalable AI platforms, responsible intelligence models and real-time analytics accelerators. It specializes in embedding ethical AI frameworks that align with regulatory needs. In the U.S., PwC leads enterprise GenAI programs across the retail and CPG, financial services, healthcare, technology, media and telecom, and industrial sectors. Across industries, PwC also brings AI to its deep expertise of domain and processes, like finance transformation, supply chain, etc.

Strengths

Functional agentic innovations: PwC has expanded its global strategic alliance with Google Cloud to enhance its specialized functional expertise, such as in finance, tax compliance, procurement and many other services. These services combine PwC's extensive domain experience with Google Cloud's AI capabilities.

The triple-power frontier: AI that spans multiple platforms and scales to enterprise-level businesses is reimagining the future of work through augmented intelligence, autonomy and reasoning, all grounded in explainable and responsible AI principles. AI agents driven by three powerhouses — Salesforce's Agentforce, Google's Agentspace and PwC's agent OS — converge to help clients build these advanced solutions.

Innovative agent OS: By architecting the agent ecosystem, PwC leverages Gemini, Agentspace, Agentforce and additional agentic platforms to connect agents to a broader framework through its new operating orchestration system, agent OS. This first-mover, business transformation-focused solution orchestrates enterprise-grade AI agents across platforms such as Salesforce, Google Cloud, Oracle and Workday. While clients can create agents on Google Agentspace or Salesforce Agentforce using Gemini models, PwC employs agent OS within any cloud or LLM to manage entire cross-platform workflows tailored to the specific needs of clients.

Caution

The cross-platform offerings from PwC, Google and Salesforce are highly relevant for large enterprise clients in the U.S. PwC should capitalize on this opportunity by expanding the scope of machine reasoning algorithms in Google's agentic models and incorporating more advanced techniques such as Mixture of Memory and dynamic optimization.

Appendix

Methodology & Team

The ISG Provider Lens 2025 – 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 study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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 Specialist and Co-Author

Sameen Mohammed Siddique

Research Specialist

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

Sameen has managed diverse technology, business, and consumer research teams, transforming market data into actionable insights and intelligence reports for several leading firms. In her prior roles, she has worked on competitive intelligence, market feasibility and SWOT assessment, GTM strategy, customer satisfaction and brand health studies. Her expertise synthesizes advanced technological understanding for competitive positioning and emerging innovation trajectories for global and regional markets.

Study Sponsor

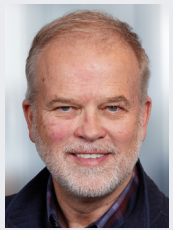
Aman Munglani

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.

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ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.

ISG Provider Lens™

JUNE, 2025

REPORT: GOOGLE CLOUD PARTNER ECOSYSTEM