

Google Cloud Partner Ecosystem

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:



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The expanding Google Cloud partner ecosystem is transforming the Brazilian cloud market

Cloud computing is a key technology for digital transformation, enabling businesses to be more agile, innovative, collaborative and cost-efficient. It provides a strong foundation for the adoption of other digital technologies and drives the evolution of organizations toward a digital future by eliminating the need to build expensive data centers. It also offers a scalable service model, resulting in significant savings in IT infrastructure costs.

While the ISG Index report (released in January 2023) on the last quarter of 2022 points to declining global spending on IT and associated services, including cloud-based infrastructure services, this does not mean a retreat from cloud adoption by enterprises. Instead, it reflects a time when companies are looking to use and optimize committed capacity rather than invest in new financial resources.

Enterprises' ongoing commitment to architectures that prioritize cloud computing opens up a vast and diverse range of opportunities to be duly explored, especially in the promising Brazilian market. These opportunities encompass both renowned cloud service providers, known as hyperscalers, and a rich ecosystem of partners, fostering collaboration and innovation in the technology industry.

Google Cloud remains the smallest of the top three public cloud providers, although it has made considerable progress in market share and has narrowed the gap with competitors in recent years. This progress can largely be attributed to the solid reputation of Google Cloud's advanced computing, big data, ML and AI solutions, which help its customers gain a competitive advantage through agility, flexibility and elastic scalability, resulting in an elevated end-user experience. In addition, the popularity of Google Cloud can also be explained by its generally more competitive pricing approach compared to other cloud providers. This advantage makes Google Cloud an attractive option for enterprises looking to avoid over-reliance on a single platform and

The Google Cloud partner ecosystem in Brazil is growing and becoming stronger.



Executive Summary

wishing to increase their negotiating power by adopting multicloud strategies.

Brazil has experienced significant investments in infrastructure over the past two years, including Internet connectivity, data centers, and the continued development of 4G and 5G wireless networks. The country is one of the most active cloud markets in Latin America, and the adoption of cloud services by enterprises and organizations in Brazil has been steadily increasing, driven by factors such as digital transformation initiatives, cost efficiency, scalability and the need for greater agility.

Owing to this growth, Google recently announced changes in its corporate structure in Brazil, making organizational changes in the relationship, CX and technology areas, aiming to strengthen partnerships and offer value to companies from various sectors through specific solutions. In addition, the company has plans to expand coverage among digital-native companies and broaden its customer base in regions far from the Rio-São Paulo axis.

The dynamism of the Google Cloud market in Brazil is highlighted in the second year of the Google Cloud Ecosystem study conducted by ISG. Since last year, it has been possible to notice the expansion and strengthening of Google's partner ecosystem in the country, with vendors investing massively to expand their competencies and certifications in Google Cloud Platform (GCP), broaden the portfolio of offerings and create dedicated business units. This partner ecosystem consists of service providers that establish a collaborative relationship with products and offerings available on GCP. Google and its partners benefit from each other's expertise and technological prowess: while Google incorporates its partners' advanced services into its platforms, partners leverage the company's broad reach and numerous benefits to meet business needs.

Based on the primary data obtained through questionnaires and extensive in-depth meetings with suppliers, as well as the secondary data

captured by specialized teams, this year's study presents a broad view of the Google Cloud ecosystem and identifies the key suppliers in each of the study's five quadrants. Each partner is then presented individually, highlighting their strengths and areas for development.

Some trends shaping the Google Cloud ecosystem were observed in this year's study and are presented below:

- Infrastructure modernization and application transformation projects are gaining ground as enterprises are directing substantial investments toward technology transformation to meet the growing demand for agility and innovation. While the lift-and-shift approach is fast and more cost-effective, some companies find it inadequate, as applications partially optimized for the cloud environment may not deliver the expected savings or extract value from cloud computing capabilities. The Google Cloud offers a broad set of capabilities for application modernization,

most notably Anthos, which enables users to rapidly build new applications and upgrade legacy applications, providing significant gains in agility.

- Security is at the heart of business decisions. The adoption of cloud computing provides a wide range of advantages to enterprises in terms of efficiency, convenience and opportunities. However, this transition can expose organizations to a number of emerging cyber threats. As a result, enterprises are increasing their investments in security and resiliency, which should remain a priority in the coming years. Google Cloud has been dedicated to expanding and enhancing its portfolio of security solutions. One of the options available is Google Chronicle, a security analytics platform built on Google's core infrastructure that simplifies the challenging job of managing and analyzing large volumes of security telemetry data. This engine uses automated analysis to correlate information



Executive Summary

from internal and external public sources, extracting relevant signals and detecting threats in an agile manner.

- Environmental, social and governance (ESG) factors are becoming increasingly important for businesses due to regulatory frameworks and the societal pressure on companies to conduct their business in a fair, appropriate and transparent manner. For many, sustainable development is becoming an integral part of business and investment strategies, without which it will be difficult to innovate and achieve further growth. Google Cloud is a strong choice for companies looking to incorporate sustainability into their operations, as the platform offers a suite of tools and solutions for ESG performance reporting and analysis and the development of GCP-based tools for internal ESG and supply chain risk management and mitigation. Additionally, Google is a pioneer in establishing sustainability commitments. The company already offsets its carbon emissions and, by 2030, will operate only with carbon-free energy sources. In Brazil,

the company has expanded its partnerships with institutions that work to keep scientific knowledge available, such as the collaboration with the Reference Center for Environmental Information (CRIA), an organization that gathers 15 million records and almost 5 million images about the Brazilian fauna and flora, making up an extensive catalog of biodiversity.

One trend that emerged in this year's study is the use of generative AI. As the interest in the subject continues to grow, some vendors are showing enthusiasm and planning to adopt generative AI, and Google, for its part, is committed to driving the development of advanced applications in the near future. The company has been establishing strategic partnerships, recently announcing the offering of consulting services and tools, enabling customers to make the most of AI to identify trends, summarize information, automate processes and generate content.

The dynamism of the Google Cloud services market in Brazil is highlighted in ISG's Google Cloud Partner Ecosystem 2023 study, evidencing the growth of the partner ecosystem and the expansion of partners' GCP competencies, which subsequently drive the success of enterprises.





Provider Positioning

Page 1 of 3

	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Accenture	Leader	Leader	Leader	Leader	Leader
Atos	Product Challenger	Product Challenger	Product Challenger	Rising Star ★	Product Challenger
BRQ	Leader	Rising Star ★	Leader	Not In	Not In
Capgemini	Not In	Product Challenger	Product Challenger	Product Challenger	Leader
CI&T	Contender	Contender	Contender	Not In	Not In
Compass UOL	Contender	Contender	Contender	Not In	Not In
Deloitte	Leader	Leader	Product Challenger	Leader	Not In
Engineering	Leader	Leader	Product Challenger	Product Challenger	Not In
Extreme Group	Not In	Contender	Not In	Not In	Not In





Provider Positioning

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	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Gentrop	Not In	Not In	Not In	Not In	Leader
GFT	Contender	Not In	Contender	Not In	Not In
Globant	Contender	Product Challenger	Contender	Not In	Not In
HVAR	Product Challenger	Leader	Product Challenger	Not In	Not In
IPNET	Leader	Product Challenger	Leader	Contender	Leader
Kyndryl	Contender	Contender	Contender	Contender	Not In
Movti	Product Challenger	Not In	Rising Star ★	Not In	Leader
Multiedro	Contender	Not In	Contender	Not In	Contender
Qi Network	Leader	Not In	Not In	Not In	Leader





Provider Positioning

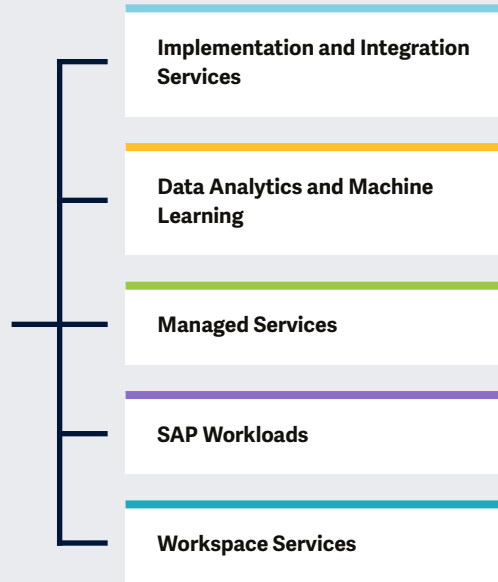
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	Implementation and Integration Services	Data Analytics and Machine Learning	Managed Services	SAP Workloads	Workspace Services
Safetec	Not In	Not In	Not In	Not In	Product Challenger
SantoDigital	Leader	Leader	Leader	Product Challenger	Product Challenger
Sauter	Leader	Product Challenger	Leader	Product Challenger	Rising Star ★
Sky.One	Contender	Not In	Contender	Not In	Not In
TIVIT	Product Challenger	Product Challenger	Product Challenger	Leader	Contender
V8.Tech	Rising Star ★	Product Challenger	Leader	Product Challenger	Not In



Key focus areas of Google Cloud Ecosystem 2023 study.

Simplified Illustration; Source: ISG 2023



Definition

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

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

cost management, governance and security, application development, machine learning, automation and citizen development.

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



Scope of the Report

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

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

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on regional market including Australia, Brazil, Europe and U.S.

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

Provider Classifications

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

As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

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

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

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





Provider Classifications: Quadrant Key

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

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.

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.

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

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

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





Implementation and Integration Services

Who Should Read This Section

This quadrant is relevant to companies in Brazil that want to evaluate providers of implementation and integration services on Google Cloud Platform (GCP), covering the design, construction and migration of solutions to the cloud. In this quadrant, ISG highlights the positioning of providers in the Brazilian market and how each one addresses the challenges faced by enterprises in the region. This assessment is based on the depth and breadth of providers' service offerings and market presence. Through the report, Google Cloud partners can view the current market dynamics and competition, while enterprises can evaluate what is new from traditional providers or new options.

In Brazil, the digital transformation process is gaining momentum, implying high demand for cloud services and solutions, driven by the advantages of a more scalable, agile and, especially, cost-effective IT infrastructure. Companies are more discerning and looking for platforms and providers that adhere to

stringent regulatory policies and focus on cost containment. This demands from providers the ability not only to offer services in hybrid and multicloud environments, generally more economical, but also to offer services efficiently and anticipating risks. Another determining factor in this scenario is the companies' ESG agenda, which foresees security, accountability and data transparency within a sustainable perspective.

In this sense, applications of agile models and AI, combined with robust security frameworks, tend to gain prominence and make up the most cost-effective, long-term offerings from GCP implementation and integration service providers.



IT leaders should read the report to understand and compare the positioning and capabilities of providers to deploy and integrate solutions with GCP capabilities.



Development leaders should read the report to assess how providers can apply new technologies and accelerate deployment and integration with the cloud through the Google Cloud Platform.



Sourcing professionals should read the report to compare GCP integration and deployment service providers to make accurate decisions and recommendations.

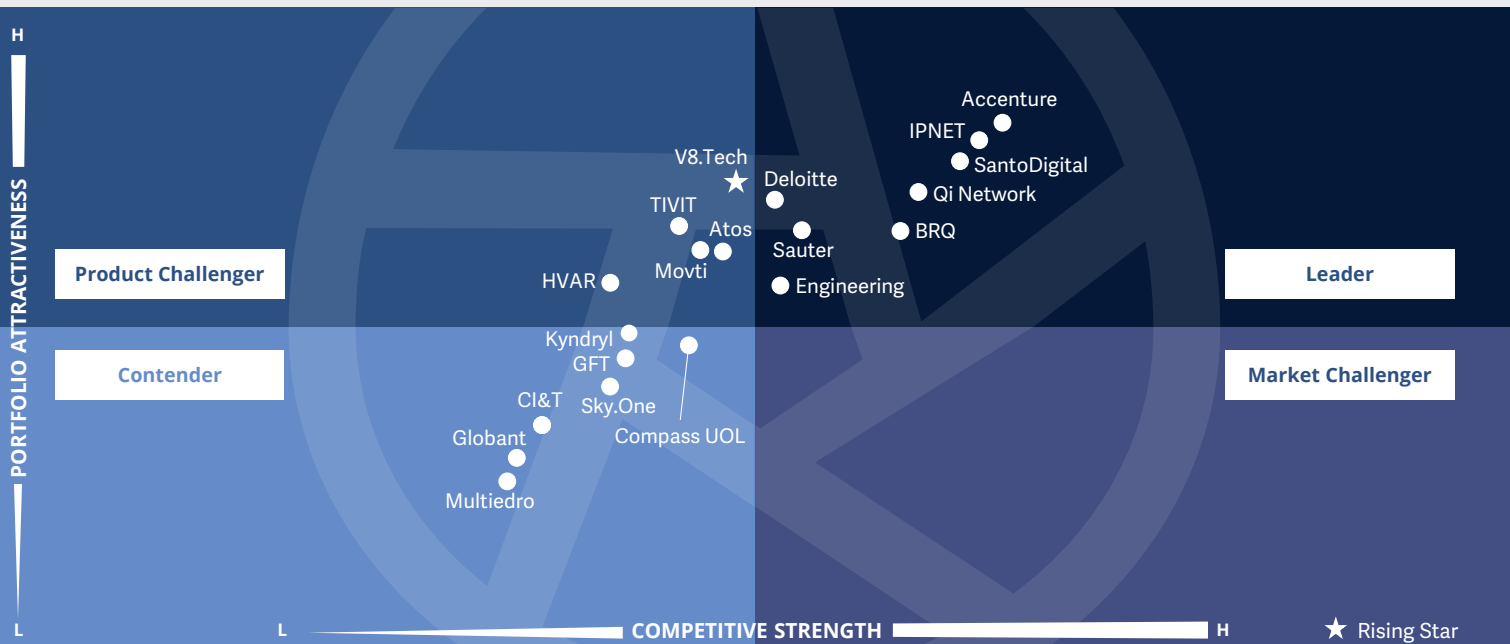


Digital transformation professionals should read the report to understand how implementing and integrating cloud services contribute to digital transformation and to compare service providers.



Google Cloud Partner Ecosystem Implementation and Integration Services

Brazil 2023



This quadrant evaluates migration, implementation, modernization and integration service providers for **data and application workloads** in GCP, helping customers achieve goals such as **cost reduction and scalability**.

Adriana Frantz



Implementation and Integration Services

Definition

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

Eligibility Criteria

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



Implementation and Integration Services

Observations

Enterprises are increasingly choosing to adopt a multicloud strategy, seeking to diversify their services across multiple cloud providers. An organization may pursue this strategy for many reasons, including legal and regulatory requirements, cost efficiency, cybersecurity and the need for redundancy to minimize the risk of system errors or outages that could result in critical business operational failure. This approach provides businesses with the flexibility and resiliency to meet the challenges of today's digital environment.

However, the multicloud approach presents significant challenges. Developing cloud-independent applications requires a considerably larger initial investment of resources. This process takes more time and requires specialized knowledge and experience. Cloud and DevOps professionals often specialize on one main platform, and hiring professionals with experience on multiple platforms or additional experts to fill knowledge gaps results in significant cost increases.

In multicloud environments, a provider plays a key role by offering guidance in defining migration strategies, optimizing workloads and implementing best practices, as well as helping the integration of disparate cloud platforms, thus enabling seamless data transfer, application connectivity and workload migration and ensuring compatibility and interoperability between different cloud services.

From the 75 companies assessed for this study, 20 have qualified for this quadrant, with eight being Leaders and one a Rising Star.



Accenture is one of the largest Google Cloud partners in the world, with more than 7,000 trained professionals and approximately 8,700 certifications. The company invests heavily in growing the number of certifications, aiming to reach 15,000 by 2025.



BRQ has a presence of more than 30 years in the Brazilian market, working on projects that drive its customers' digital transformation. The company has over a thousand professionals with vast experience and expertise in cloud computing solutions.

Deloitte.

Deloitte operates in 150 countries and has over 415,000 employees in 700 global offices. It is a strong Google Partner with eight Specializations and was recently recognized by Google Cloud with the important Industry Solutions Partner of the Year award.

Engineering do Brasil

Engineering do Brasil is part of the Engineering Group, an Italian multinational information technology and consulting company specializing in digital transformation, present in Latin America, Europe and North America, with about 12,000 professionals.

IPNET

IPNET was founded over 20 years ago and focuses on helping its customers throughout their digital cloud transformation journey. It is one of the main Google Cloud partners in Latin America and holds four GCP certifications; it recently became a Google Cloud Managed Service Provider (MSP).

Qi Network

Qi Network has strengthened its partnership with Google Cloud by achieving two GCP Specializations: Work Transformation - SMB and Infrastructure, a recognition of its delivery capability and quality of services.

SantoDigital

SantoDigital is a business consultancy founded over 10 years ago, focused on delivering digital transformation, cloud computing, ML and AI services. It was the first company in Latin America recognized by Google Cloud as an MSP.



Implementation and Integration Services

Sauter Digital

Sauter Digital is a niche, cloud-native technology consulting firm founded in 2020. Through accelerated growth and proven success cases, is consolidating itself as one of Brazil's main Google Cloud partners.



V8.Tech (Rising Star) is a Brazilian company operating in Brazil and other Latin American countries. It has highly qualified teams to execute both cloud migration projects and support the modernization of customers' applications and databases.



BRQ



"BRQ has an experienced and highly skilled team to deliver infrastructure migration and modernization projects in Google Cloud with excellence."

Adriana Frantz

Overview

For three decades, BRQ has stood out as a leading Brazilian company providing services that drive digital transformation. With a strong commitment to excellence in delivery, BRQ is proud to have an extensive customer portfolio exceeding 150 companies. Its projects extend beyond national borders, covering eight countries, and demonstrate BRQ's ability to adapt and meet the needs of organizations in different parts of the world.

Strengths

Robust portfolio of services: BRQ, as a Google Cloud expert partner, offers a full range of implementation and integration services on the platform. BRQ's services cover the entire cloud transformation lifecycle, from consulting services and cloud experience customization to building the necessary structure for the adoption, migration and implementation and configuration of cloud resources per workload-specific standards.

GCP Infrastructure Specialization: BRQ's Infrastructure Specialization demonstrates its well-defined processes for executing infrastructure deployment projects and comprehensive capabilities for gathering requirements, analyzing legacy environments and creating solutions consistent with Google Cloud's best practices.

Qualified and experienced professionals:

BRQ has a highly qualified team of more than 1,000 professionals specializing in cloud computing solutions. Through their vast experience, these specialists have played a key role in hundreds of infrastructure migration and modernization projects for large customers in various industry sectors, thus showcasing BRQ's ability to meet the most challenging demands.

Caution

BRQ could increase its Google Cloud Infrastructure Specialization visibility, an important achievement that can differentiate it from competitors, by reinforcing its reputation as a leading company in implementation and modernization projects.





Data Analytics and Machine Learning

Data Analytics and Machine Learning

Who Should Read This Section

This quadrant is relevant to companies in Brazil that want to evaluate providers of data analytics and machine learning services on GCP, covering data management and optimization on the cloud. In this quadrant, ISG highlights the positioning of providers in the Brazilian market and how each one addresses the challenges faced by companies in the region. This assessment is based on the depth and breadth of providers' service offerings and market presence. Through this report, Google Cloud partners can view current market dynamics and competition, while enterprises can evaluate what is new from traditional providers or new options.

Cloud services and solutions bring about increasingly broader integration of multiple systems and channels, generating huge volumes of information. Therefore, efficient big data management to process and analyze cloud content is in high demand in the Brazilian market.

On the other hand, more mature companies are constantly modernizing systems and data governance practices and investing in more innovative, effective and low-cost solutions. Providers are building data-as-a-service offerings, including broad services for structuring and organizing data lakes, and developing more competitive big data analytics tools and capabilities.

In this scenario, the biggest challenge for the success of data analytics and machine learning services is the competence to explore GCP tools and resources, held back in part by the scarce specialized and qualified workforce. For this reason, the most salient competitive differentiator for providers is the expertise in GCP technologies and tools.



IT leaders should read the report to compare providers' capabilities to develop and apply data analytics and machine learning services with GCP capabilities and how they can impact business outcomes.



Digital transformation professionals should read the report to know how data analytics and machine learning services on GCP can support digital transformation initiatives and to compare providers.



Software and technology development leaders should read the report to assess how providers have applied new data analytics and machine learning technologies to GCP.





This quadrant evaluates providers of Google Cloud **data analytics and machine learning services** that help enterprises modernize their **data, governance and AI capabilities**.

Adriana Frantz



Data Analytics and Machine Learning

Definition

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

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

Eligibility Criteria

1. Scope and use relevant **tools and technologies**
2. Integration and innovation of **holistic DAML** solutions and services
3. Availability of practices and programs to upgrade skills and **drive consumer success** (e.g. consulting or best practice *frameworks*, ROI identification, and business case development)
4. **Availability, experience, and resource certifications** and competencies in DAML-related technologies in GCP
5. Availability of **offers, routes, and innovations with a focus on GCP** (current and planned)
6. Number and reputation of references regarding **DAML services and solutions** in GCP
7. A viewpoint on recent developments in machine learning, such as **big language models**
8. Strong **focus and expertise on a wide range of GCP AI-oriented tools** to help companies move away from conventional data management practices and *frameworks*
9. Focus on creating **industry-based solutions** to solve specific business problems



Data Analytics and Machine Learning

Observations

Cloud technology alone provides only a fraction of the real value to a business. However, the combination of cloud computing and data has the power to truly unlock value and create customer experiences. However, before data can generate valuable insights, a data journey full of challenges must be done.

One of the first steps is to address the challenge of centralizing raw business process data on the cloud. Service providers have the ability to meet the demand for data migration and create single repositories, allowing different business functions to analyze data in ways that meet their unique needs with greater speed and flexibility. They have developed tools and accelerators capable of migrating data from different databases and speeding up the migration process. From this well-built framework, businesses can take advantage of the analytical capabilities available on the cloud.

Companies are also struggling to use AI faster, with greater accuracy, and at scale. GCP is very competitive in this area, and specialized vendors can harness the power of platform-specific

AI solutions to transform organizations and solve problems. On GCP, it is possible to use solutions that can accelerate the development and deployment of AI models through a pre-trained API that requires no code. The platform also provides custom AI with automated ML for predictive modeling on structured and unstructured data without code.

From the 70 companies evaluated for this study, 17 have qualified for this quadrant, with five being Leaders and one a Rising Star.

accenture

Accenture has invested in acquisitions, such as the Brazilian company Tenbu, to strengthen its position as one of the largest and most qualified data and analytics companies in Brazil.

Deloitte.

Deloitte offers a broad portfolio of data services using Google Cloud big data and analytics tools to solve the most complex business problems.

Engineering do Brasil

Engineering do Brasil uses sophisticated data analytics and AI techniques and thereby produces success cases that demonstrate its ability to develop extremely complex solutions for the challenges faced by businesses.

HVAR

HVAR, a Brazilian consultancy founded in 2011, specializes in data, analytics and AI solutions. The company is a strategic partner of Google Cloud and has significant expertise in data analytics.

SantoDigital

SantoDigital is one of the few local companies that have Google Cloud's Machine Learning Specialization. This means that the company can help its customers use Google Cloud AI and ML services to solve complex business problems.



BRQ (Rising Star) has a deep knowledge of the Brazilian market and has developed sectorial solutions for data analytics and AI, using advanced Google Cloud resources, to meet the specific needs of each sector.





"BRQ is a Google Cloud partner able to accelerate the democratization of information, thus helping companies make better data-driven decisions."

Adriana Frantz

BRQ

Overview

For three decades, BRQ has stood out as a leading Brazilian company in providing services that drive digital transformation. With a strong commitment to excellence in delivery, BRQ has an extensive customer portfolio, exceeding the mark of 150 companies served. These projects extend beyond national borders, covering eight countries, which demonstrates the global presence of BRQ and its ability to adapt and meet the needs of organizations in different parts of the world.

Strengths

Use of accelerators: BRQ uses its own and GCP's accelerators, such as Cortex Framework, to automate legacy database migration to Google Cloud and support analytics acceleration projects, consuming SAP and Salesforce data. The incorporation of these accelerators enables the efficient replication of similar projects, resulting in reduced delivery times and lower risk.

Industry solutions: BRQ has invested in developing industry solutions for data analytics and AI using advanced Google Cloud capabilities to meet the specific needs of segments such as retail, finance and telecommunications.

Broad data analytics service offering:

BRQ offers a comprehensive portfolio of data solutions. This includes everything from consulting and strategic planning projects to current architecture analysis and future architecture design services. The company also stands out in the creation and modernization of analytical bases, migration of legacy data to GCP, and in the development of dashboards and reports to assist in decision-making. In addition, BRQ has the expertise to conduct advanced data science projects, ML applications, clustering and forecasting, among others, demonstrating its ability to handle sophisticated tasks in this field.

Caution

BRQ should look to obtain GCP Specializations focused on data analytics and AI, as these credentials are an important indication to the market that BRQ has extensive knowledge of GCP tools, solutions and APIs to create intelligent solutions that drive new business insights.





Managed Services

Managed Services

Who Should Read This Section

This quadrant is relevant to companies in Brazil that want to evaluate providers of GCP managed services, which are key to ensuring the success of cloud solutions. In this quadrant, ISG highlights the positioning of providers in the Brazilian market and how each one addresses the challenges faced by enterprises in the region. This assessment is based on the depth and breadth of providers' service offerings and market presence. Through the report, Google Cloud partners can view current market dynamics and competition, while enterprises can evaluate what is new from traditional providers or new options.

The expansion of the cloud migration process stimulates the demand for managed services, as monitoring and support are critical to ensure the security and quality of integrated services. Whether from migration or the management of an already implemented cloud infrastructure, the providers that lead the competition are those able to align with their scope of work aspects such as response agility, resilience

and operational improvement, which are often among the priorities of enterprises when looking for managed services.

Enterprises look for providers that have teams of skilled professionals to deliver features and tools focused on sustaining the smooth operation of hybrid or multicloud environments. Providers are excelling at creating and optimizing robust security measures, coupled with Google Cloud tools, to reduce enterprises' exposure to emerging cyber threats.



IT leaders should read the report to assess the managed services offered by providers and compare their capabilities to use GCP features and tools.



Sourcing professionals should read the report to compare the capabilities of GCP managed service providers to make accurate decisions and recommendations.



Cybersecurity professionals should read the report to evaluate how GCP managed services can contribute to network and data protection and to compare service providers.

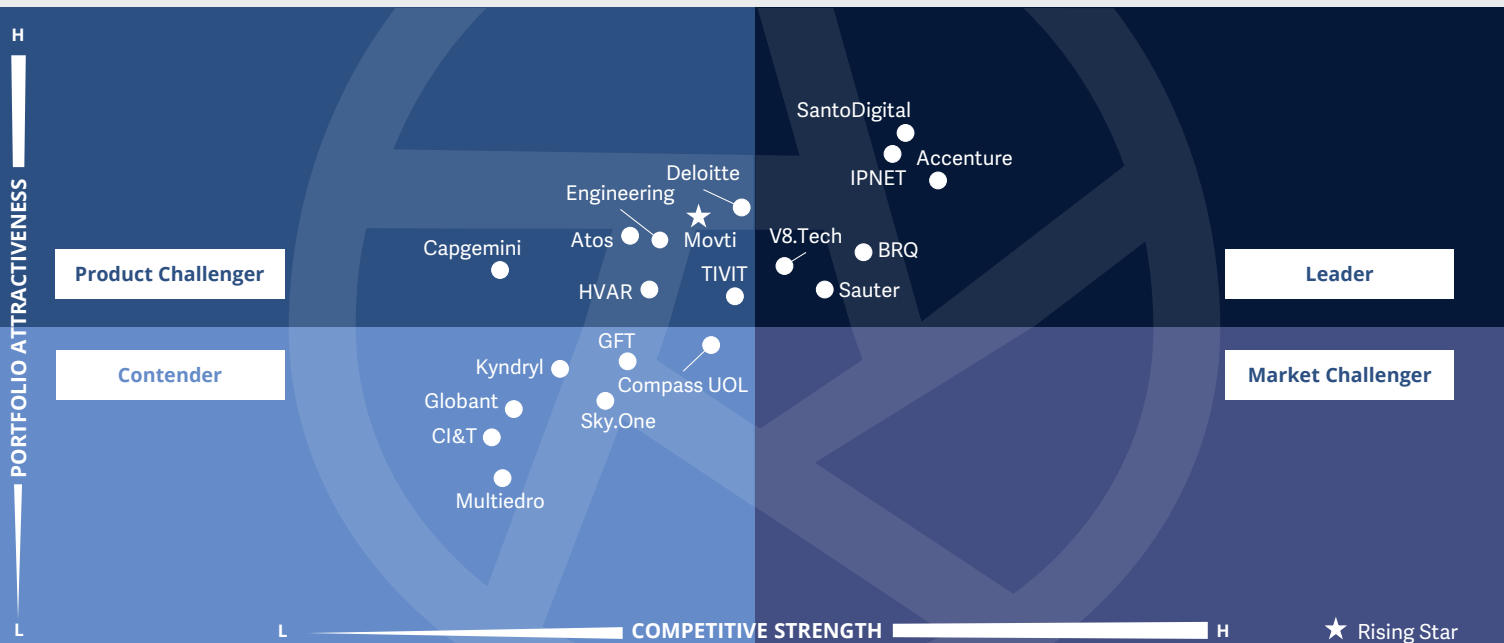


Software and technology development leaders should read the report to assess how providers have applied new technologies to managed services on GCP.



Google Cloud Partner Ecosystem Managed Services

Brazil 2023



This quadrant evaluates providers of managed services on GCP. These partners should be able to perform **resource provisioning, performance monitoring, and security and compliance** assurance across multiple clouds.

Adriana Frantz



Managed Services

Definition

The quadrant assesses managed public cloud service providers offering professional and managed services to augment Google's built-in capabilities, including IaaS and PaaS. The professional and managed services include orchestration, provisioning, real-time and predictive analytics, and monitoring and managing a customer's public cloud and multicloud environments. The goal is to maximize the performance of enterprise cloud workloads, reduce costs and ensure compliance and security. Service providers typically offer significant levels of automation and transparency over the managed cloud resource pool to customers using specially developed or licensed cloud management platforms and tools. SLAs for managed services normally encompass a wide range of services to drive business value, such as data management and governance, machine learning capabilities, and ESG and sustainability tools and assets. Managed service providers also have teams well-versed in GCP-native skills such as cloud-native

operations, site reliability engineering (SRE) and platform reliability engineering (PRE). The maturity of managed services offerings for GCP can also include usage and impact of innovative IPs and tools and service delivery frameworks. These include cloud FinOps, automation tools to improve service availability and resilience, cloud and data security, regulatory compliance and governance tools.

Eligibility Criteria

1. Experience **creating, building, and managing public and multicloud environments** with a focus on Google Cloud
2. Support **software code development, cloud native architectures**, and integration of *cloud native* and legacy systems
3. Experience **implementing Agile and DevOps development** as well as integration with existing customer processes
4. Experience in **API automation and cloud analytics**
5. Have well-developed **security practices and features**
6. Strength of the vendor's **partnership with Google Cloud**, measured by the number and category of **relevant certifications**, length of relationship with Google Cloud, and evidence of strategic cooperation between the vendor and Google Cloud
7. **Proven use cases or proof of concept (PoCs)** in healthcare, sustainability, financial services, insurance, and other market segments



Managed Services

Observations

The adoption of multicloud approaches to mitigate risk and reduce costs is a trend noted by ISG in this year's study. However, these benefits come with a dramatic increase in network complexity, which, in turn, presents significant security challenges.

The multiplicity of environments amplifies the complexity of service management as it requires the implementation of a single cloud management system that can monitor performance on several crucial metrics and effectively manage distributed workloads across different cloud platforms.

Multicloud environments demand experienced and highly skilled vendors that can help optimize costs by analyzing usage patterns from different clouds, identify areas of overspending, and suggest strategies for resource allocation and proper sizing. They can also negotiate favorable pricing and discounts with cloud providers.

Complicated tasks that must be performed to ensure security become more challenging when adopting a multicloud strategy, where the

same team must manage the configurations of multiple platforms and ensure that all can communicate securely. Vendors are key in this process as they provide robust security measures, monitoring tools and compliance frameworks to protect data and ensure regulatory compliance across multiple cloud environments. They stay up to date with the latest security practices and can implement appropriate measures.

From the 75 companies evaluated for this study, 20 have qualified for this quadrant, with six being Leaders and one a Rising Star.

accenture

Accenture maintains strong partnerships with leading hyperscalers and has invested in increasing the number of certified professionals on all public cloud platforms, which increases its ability to manage multicloud environments.



BRQ is a Brazilian company founded more than 30 years ago. It is highly qualified to provide companies with the necessary solutions to ensure visibility and control of their cloud resources.

IPNET

IPNET is one of the few Google Cloud MSPs in Brazil. It has a complete portfolio of managed services and high competence in FinOps to help organizations optimize their spending and financial operations on the cloud.

SantoDigital

SantoDigital is the first company in Latin America recognized as a Google Cloud MSP, which means that the company has a high GCP skill designation, a complete portfolio, and advanced and proactive technical support.

Sauter Digital

Sauter Digital offers a broad set of managed services for Google Cloud, with a particular emphasis on FinOps models, to help customers optimize their cloud spend.



V8.Tech has strategic relationships with leading hyperscalers, which puts it in a leading position to manage complex multicloud environments with a high level of effectiveness and success.

Movti (Rising Star)

Movti (Rising Star) is a Brazilian technology company focused on digital transformation services, with a focus on cloud solutions. Its partnership with Google Cloud has been rapidly strengthened through GCP certifications and specializations.



BRQ



Leader

"The competence to manage multicloud environments puts BRQ in a prominent position to take advantage of the accelerated growth of this market."

Adriana Frantz

Overview

For three decades, BRQ has stood out as a leading Brazilian company in providing services that drive digital transformation. With a strong commitment to excellence in delivery, BRQ has an extensive customer portfolio, exceeding the mark of 150 companies served. These projects extend beyond national borders, covering eight countries, which demonstrates BRQ's ability to adapt and meet the needs of organizations in different parts of the world.

Strengths

Multicloud environment management:

BRQ has relationships with leading hyperscalers, which enables it to effectively and successfully deal with the complexity of multicloud environments. This vast network of strategic relationships puts BRQ in a unique position to address the challenges arising from distributed environments, ensuring that its customers can fully realize the potential of their cloud investments.

Delivery capacity: BRQ stands out for the excellence in the quality of its services, proven by the recognition of its customers. The company has a solid team, highly qualified and specialized in various verticals, which further strengthens its reputation before its customers and consolidates its position as a reliable supplier of solutions.

FinOps competency: Owing to its experience and technical expertise, BRQ is able to provide enterprises with the necessary solutions to ensure visibility and control of their cloud resources, as well as efficient management and optimization of associated costs. With a qualified team and a results-oriented approach, BRQ uses the most advanced GCP tools and practices to help organizations ensure the intelligent management of their infrastructure.

Caution

An important step in the consolidation of BRQ's partnership with Google Cloud is to be recognized as an MSP. For this, BRQ must accelerate the number of GCP Specializations, as well as expand the portfolio of services and proactive technical support.





SAP Workloads

Who Should Read This Section

This quadrant is relevant to companies in Brazil that want to evaluate providers of SAP implementation and integration services on GCP, which can help reduce friction and ensure application success. In this quadrant, ISG highlights the positioning of providers in the Brazilian market and how each one addresses the challenges faced by companies in the region. This assessment is based on the depth and breadth of providers' service offerings and market presence. Through the report, Google Cloud partners can view the current market dynamics and competition, while enterprises can evaluate what is new from traditional providers or new options.

There are a number of advantages to moving SAP to the cloud, starting with integration with other systems, which contributes to the generation of more holistic data analysis. In addition, factors such as information availability, operational visibility and process agility are determining factors in reducing the friction during workload execution.

Companies that choose GCP to host SAP can count on solid scalability and flexibility resources, which are fundamental when there is a high volume of work. The platform also brings easy and integrated access to Datasphere databases. However, in Brazil, SAP migration to GCP is still incipient, with a small portfolio of such projects in the region.

Nevertheless, providers that perform SAP migration and integration on GCP need to meet strict security requirements, allocate certified professionals and propose solutions that facilitate the autonomy of SAP management by the enterprise, such as data analysis models and AI solutions.



IT leaders should read the report to understand and compare the positioning and capabilities of providers to manage the transition and maintenance of SAP on GCP.



Digital transformation professionals should read the report to understand how SAP-on-GCP services contribute to digital transformation and to compare service providers.



Sourcing professionals should read the report to compare SAP-on-GCP service providers to make decisions and recommendations accurately.



Finance, HR and HCM leaders should read the report to understand how SAP-on-GCP services contribute to their work and to compare the capabilities of service providers.



Google Cloud Partner Ecosystem SAP Workloads

Brazil 2023



This quadrant evaluates providers of services related to the migration and management of the **SAP system** to Google Cloud. These partners assist customers with **planning, solution design and user training** to enable the proficient use of SAP.

Adriana Frantz



SAP Workloads

Definition

This quadrant assesses service providers that offer provisioning and ongoing operations for SAP systems, such as SAP HANA on Google Cloud and its central management. These service providers use Google Cloud as a hardware replacement or hardware extension (as IaaS) in customer companies and optimize, design and develop new processes and business services as part of platform management. They do this by combining their services with SAP services and Google. This group of professional IT service providers is responsible for implementing and ensuring subsequent operations. Successful service providers must have strong relationships with Google Cloud and SAP. They should also be able to demonstrate, through customer case studies and success storyboards, how they have helped clients running SAP and related enterprise technology stacks across different industries, to leverage the Google Cloud ecosystem for SAP HANA Enterprise Cloud, S/4 HANA, SAP Ariba, etc. The focus will be on how clients realize value from SAP on GCP

in terms of higher cost efficiency, improved accuracy and speed of enterprise business processes running on the SAP tech ecosystem, and data and application security. Efficiencies achieved by clients can also be demonstrated in resizing virtual machines and speed of scaling of enterprise infrastructure elasticity and resilience.

Eligibility Criteria

1. Scope and depth of service portfolio for **workload migration** to SAP on Google Cloud Platform
2. Ability to **develop and design new processes** and customer outcomes for SAP on Google. Particular relevance to industry capabilities is important
3. Customization, provisioning and support for **implementation of SAP applications and services**
4. Experience and expertise in **process discovery, scripting, migration impact assessment**, and scaling evaluation
5. Ability to **develop and design new processes** and customer outcomes for SAP on Google Cloud
6. Strength of the vendor's relationship with Google Cloud, measured by the number and type of **Google Cloud certifications**, as well as with the strength of the relationship with SAP, measured by **relevant SAP certifications**
7. Experience in Google site **reliability engineering principles**
8. Ability to support **SAP's software as a service (SaaS) model** in GCP



Observations

Google Cloud and SAP have been pushing the boundaries of their partnership. Recently, both announced a comprehensive open data offering designed to simplify scenarios and unlock the potential of enterprise data. The offering enables customers to build end-to-end cloud data and bring data spread across the organization by SAP® Datasphere in conjunction with GCP data.

The initiatives of the two companies aimed at integrating SAP systems and data with Google Cloud open doors to new opportunities, allowing companies to derive greater value from their data. However, as noted by this year's study, there are still limited projects to migrate workloads to SAP on GCP in the Brazilian market.

The vendors that are succeeding are those that historically have a long-standing partnership with SAP and have large teams of highly experienced and certified professionals for GCP.

These are typically large players that are able to be more competitive even though SAP is one of the most complex areas of IT implementation and migration. These leaders are known for providing a wide range of services for SAP on GCP, which include consulting, advisory, migration, implementation, modernization and various managed services for SAP.

The remaining vendors are investing in extending their SAP capabilities by attracting and retaining experienced professionals on the platform. In addition, there is a move to increase the scope and depth of the service portfolio, as well as improve the development of accelerators and the use of automation to accelerate the migration of SAP workloads to GCP.

From the 40 companies evaluated for this study, 11 have qualified for this quadrant, with three being Leaders and one a Rising Star.

accenture

Accenture has a very robust partnership with SAP and Google Cloud and has the world's largest teams specializing in both platforms. This assures Accenture's clients of its high capacity to perform a fast and efficient migration of SAP workloads to GCP.

Deloitte.

Deloitte has more than three decades of experience in enabling SAP solutions, with over 25,000 professionals focused on SAP worldwide. For the quality of the implementations carried out, the company was recognized with 62 SAP awards in the last five years.

TIVIT

TIVIT is a Brazilian multinational technology company with 25 years in the market and operations in ten Latin American countries. The company has an SAP CoE that brings together the knowledge and experience acquired by the company in critical business processes.

Atos

Atos (Rising Star) has more than 110,000 employees and operates in 71 countries. Present in Brazil for over 30 years, it offers consulting and IT services for the digital transformation of its clients. It has a strong partnership with GCP and SAP, with numerous certifications in both.





Workspace Services

Who Should Read This Section

This quadrant is relevant to companies in Brazil that want to evaluate providers of consulting, migration and support services for Google Workspace and all available resources. In this quadrant, ISG highlights the positioning of providers in the Brazilian market and how each one addresses the challenges faced by enterprises in the region. This evaluation is based on the depth and breadth of the providers' service offerings and market presence.

With the ongoing transition to sustainable hybrid or fully remote working models, work execution and management platforms and systems have become indispensable. Although the adoption of Google Workspace represents a smaller market share compared to platforms from other vendors, companies that choose the platform rely on a safe and cost-effective alternative committed to user experience and equipped with innovative tools and features that ensure the fluidity of collaboration; this is necessary for the seamless operation of companies of any size.

As every technological or cultural transition requires attention so that it happens in a friendly way and is sustained over time, providers have more prominence and chances to remain well-positioned in this market when, besides offering training for the effective use of Google Workspace, offer continued support services after the implementation of the platform and/or consultation on best practices and digital work methodologies.



IT leaders should read the report to evaluate the services available for Workspace and compare providers' abilities to use available GCP resources to offer the services.

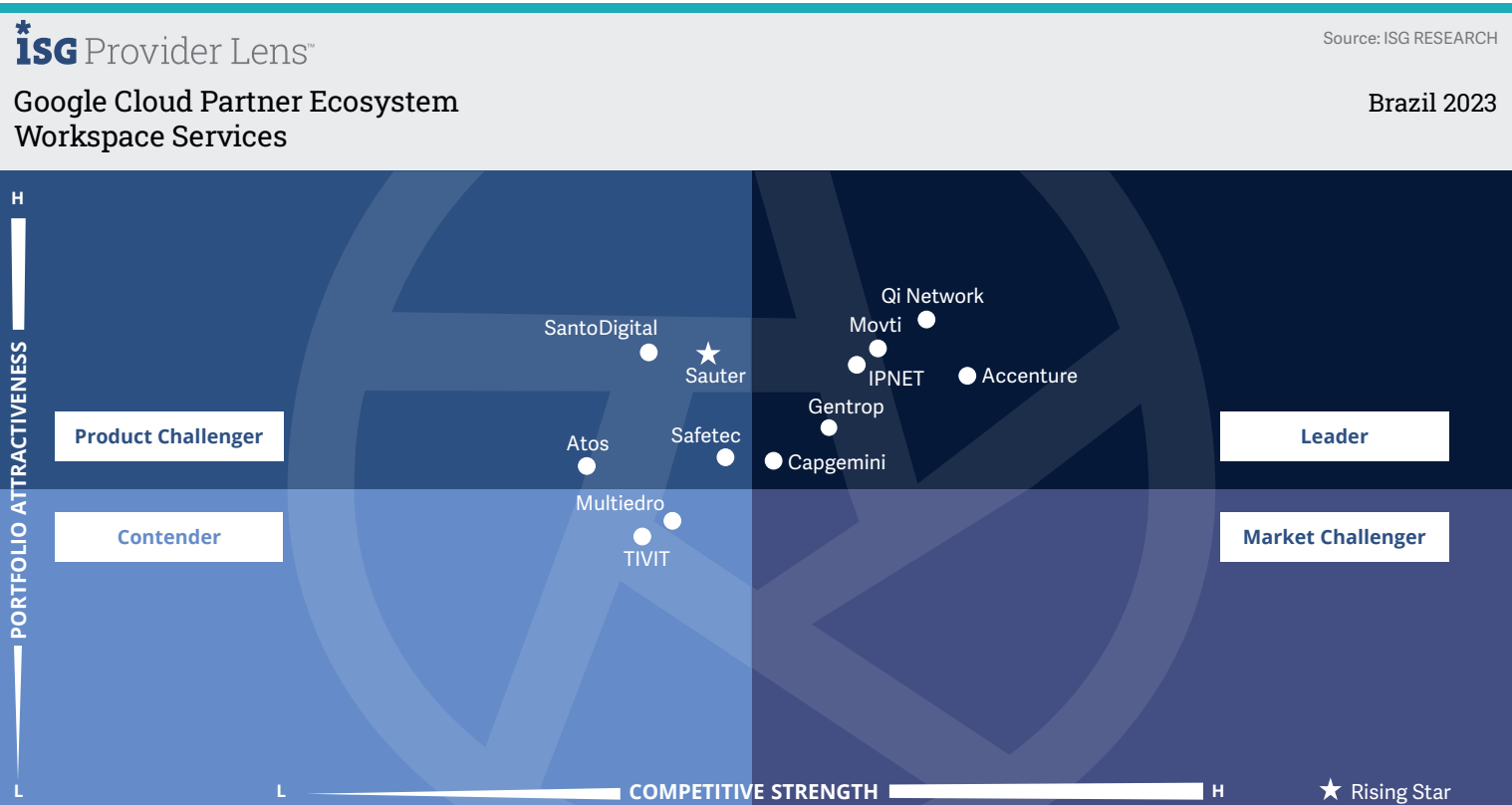


Digital transformation professionals should read the report to understand how Google Workspace capabilities can contribute to the digital transformation of enterprises and to compare service providers.



Finance, HR, and HCM leaders should read the report to understand how Workspace solutions impact their work and how GCP features can contribute to enhancing employee experiences.





This quadrant assesses providers that help companies integrate and manage Google Workspace and provide services to **establish governance, technical implementation, staff training, processes and support.**

Adriana Frantz



Workspace Services

Definition

This quadrant assesses GSIs and IT providers offering advisory, migration and integration services for Google Workspace, Google's suite of productivity and collaboration and content tools for enterprises. Workspace provides a broad range of apps, including Gmail, Meet, Chat and Drive, to drive enterprise productivity and real-time collaboration. Google Workspace, which evolved from the G Suite productivity package, is developing rapidly and incorporating intuitive analytics, numerous data and device administration, and security features. Google Workspace brings personalized user experiences into controlled and secure enterprise environments. It allows multidevice and multichannel workspace integration and helps users get a seamless experience across their professional communication and content sharing practices. Enterprises seek providers that can orchestrate, integrate and augment the native Workspace functionality through design and build services on intranets, websites and integration with additional enterprise and third-party data sources and applications.

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

Eligibility Criteria

1. Ability to provide **consulting and design** services for Workspace services on Google Cloud
2. Experience in providing **training and change management** services for Workspace services
3. Experience in **legacy migrations to Workspace**, especially of local Lotus Notes-based e-mail systems
4. Demonstrate **advanced content analysis and data mining capabilities** for company content in Workspace
5. **Administration, IT governance, and security services** for modern data workloads and endpoint management
6. Provide services and frameworks to **accelerate low-code/citizen developer activities** in the Workspace
7. Provide **organization-specific data analysis and insights into** Workspace, such as adoption rates and work and collaboration patterns



Workspace Services

Observations

While there is much debate about the pros and cons of face-to-face and remote working models, it seems that many companies are embracing hybrid working as an alternative between the two models. Google Workspace continues to show strong growth, especially in the enterprise space, because it is designed to address the challenges of hybrid working by establishing high levels of secure, flexible and borderless collaboration.

Google Workspace, aware of the opportunities presented by hybrid working, has invested in incorporating innovative voice, video conferencing and collaboration spaces into the platform to support organizations with a strategy that reduces friction, simplifies costs and lowers security risks associated with maintaining multiple platforms. With a unified approach to communications and collaboration, enterprises can create a sustainable hybrid working model.

The number of migrations to Workspace in the Brazilian market still remains smaller compared to similar tools from other vendors. However, partners in the ecosystem formed

around Workspace are moving quickly to enhance their implementation, migration and change management offerings to support enterprises with their transformation journey. Additionally, many vendors have invested in certifications and have achieved important Workspace-specific specializations, such as Work Transformation - Enterprise and Work Transformation - SMB, aimed at projects in small and midsize enterprises.

From the 50 companies evaluated for this study, 21 have qualified for this quadrant, with six being Leaders and one a Rising Star.



Accenture is a global company with operations in 49 countries and over 738,000 employees. It offers a full suite of services to facilitate the migration and management of Google Workspace, including consulting, technical development and change management.



Capgemini is a global consulting, technology services and digital transformation company. It is a Google Cloud partner with over 250 certified professionals and two Specializations, Data Analytics and Work Transformation. It primarily aims at serving large corporations.

Gentrop

Gentrop is the advisor with expertise in creating corporate transformation and data management processes, with a mission to help companies innovate on cloud. It is a major Google Cloud partner with two Work Transformation Specializations: SMB and Enterprise.

IPNET

IPNET specializes in offering a range of services that turn Google Workspace into a solid framework for driving enterprises' digital transformation. The company has a strong relationship with Google Cloud and has several Specializations on the platform.

Movti

Movti is a Brazilian technology services company specializing in digital transformation services with a focus on cloud solutions. Specialized in work transformation, it has a complete portfolio of services to help companies migrate and manage their Workspace solutions.

Qi Network

Qi Network has extensive experience and a highly qualified team in offering consulting, migration and integration services for Google Workspace. This expertise allows the company to accelerate the process of tool implementation in an efficient and effective way for its clients.

Sauter Digital

Sauter Digital (Rising Star) has recently won the first GCP Specialization in Work Transformation, focused on SMEs. This demonstrates the capacity and quality of delivery realized by the company in Google Workspace projects.





Appendix

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

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

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

The study was divided into the following steps:

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



Author & Editor Biographies

Author



Adriana Frantz
Analyst

Adriana Frantz brings over 20 years of professional experience in the financial and technology industry, project and process consulting, team leadership and conducting research. She is a senior partner at TGT Consulting, a management and technology consultancy in the market, focused on projects involving transformations, complex decisions and business risks. She works as an analyst and author at ISG responsible in Brazil for Google Cloud Partner Ecosystem, Contact Center, Digital Banking Services and ESG studies. Adriana is also a professor of several graduate courses.

She is currently studying her PhD in Business Administration at the University of São Paulo with a focus on ESG and financial performance, she holds a master's degree in the same area from Fundação Instituto de Administração, has a postgraduate degree from FGV and a degree in Computer Science from UNESP.

Research Analyst



Kelly Ribeiro
Analyst

Kelly Ribeiro is a Research Analyst at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on IoT, Google Cloud Ecosystem, Next-Gen ADM Services, MarTech, AWS Ecosystem, Public Multi Cloud, and Analytics. She contributes in the research process and with the development of content related to the business context, trends and insights of the Brazilian market.

Kelly joined ISG in January 2023. Prior to this role, she worked as a researcher, gaining experience and technical skills to collect, analyze and present quantitative and qualitative data. Her expertise covers market research, technology, trends and behavior.





IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



iSG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this [webpage](#).

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iSG

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JUNE, 2023

REPORT: GOOGLE CLOUD PARTNER ECOSYSTEM