

Google Cloud Partner Ecosystem

Google Cloud Enterprise Data Infrastructure Services

A research report comparing the strengths
and advantages of Google Cloud partners

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Get more value and innovation through cloud, AI and data with Google Cloud partners in Brazil

The cloud market in Brazil has seen significant growth in recent years, driven by the digital transformation of businesses and the need for more modern, efficient and flexible IT solutions. Google Cloud continues to gain market share in the country, driven by its impressive set of AI, modernization and data analysis tools and services, as well as strong security features. Google Cloud is also known for its open-source ease of use and developer-centric approach.

The fourth edition of the ISG Provider Lens™ Google Cloud Ecosystem 2025 study reflects the advancement of the platform in the country, evidenced by the record number of providers that participated in the study, with the entry of new companies that have started operating in Brazil or have become more robust partners of Google Cloud and Google Workspace.

The expansion of the provider ecosystem makes the market more competitive in the country and offers customers a diverse range of advanced service options, allowing them to benefit from features such as AI, data analysis and real-time collaboration, which are fundamental to meeting the demands of the contemporary market. Based on the number of companies evaluated in the study, the growing volume of specializations and expertise demonstrated by the providers and the addition of success stories, it can be inferred that the ecosystem of Google Cloud partners in Brazil is consolidating, becoming more mature and complete.

Google Cloud is also making headway in the public sector in Brazil, promoting digital transformation and the modernization of government services. The platform has helped different government bodies, from large entities in the Executive and Judiciary branches to town halls in midsize cities, to digitize services and improve efficiency, as well as offering solutions that facilitate advanced data analysis, enabling more informed decisions in the formulation of public policies.

Google Cloud
helps **simplify**
GenAI
integration,
accelerating
innovation and
efficiency.



Other trends observed in the market are as follows:

AI agents

AI agents, autonomous systems that use AI to interact with the environment, make decisions and carry out tasks autonomously, emerged as a significant topic in this year's study. Google AgentSpace, Google's platform launched in December 2024, makes it possible to quickly deploy precreated agents or simplify the development of customized agents and vertical solutions.

It is still too early to understand the full potential of AI agents. Some people believe that they will be restricted to performing specific tasks, while others see the possibility of having networks of interconnected agents that will require less human intervention than AI requires. Regardless of the scope, providers in Brazil have been highly enthusiastic about Google's tool and some have already started using it, integrating AI agents into cloud and security monitoring, as well as optimizing migrations to the cloud.

Investment in generative AI (GenAI)

After a period of experimentation, GenAI has begun to gain more traction, and in this edition of the study, providers present a wider range of success stories. These examples go beyond traditional applications, ranging from sophisticated personalization in customer service and efficient knowledge management to faster analysis of unstructured data, the modernization of legacy systems and the application of technology throughout the software development cycle.

The providers that stood out in this area were those that took a consultative approach to understanding business needs, mapped out the risks involved, managed to demonstrate the value generated, leading their customers to adopt GenAI reliably, reducing uncertainty and skepticism. In addition, they were able to make intensive use of Google's powerful resources and tools, such as Vertex AI, to scale their AI applications efficiently.

Focus on data modernization

Many organizations are trying to implement GenAI on a legacy infrastructure, with scattered, isolated and outdated data and processes. As a result, they fail to get the right insights, automations stall and teams are unsuccessful in applying GenAI beyond basic tasks. Companies that recognize the need for a solid data strategy and modern, robust databases, driving a significant shift toward data modernization, are moving rapidly to take better advantage of AI technologies.

Service providers play a crucial role in helping companies navigate these trends, offering relevant tools, platforms and the experience needed to manage, analyze and protect data in this rapidly evolving environment. With innovations such as BigQuery, Vertex AI and Dataflow, Google Cloud offers robust solutions that improve the scalability and efficiency of data management in all sectors.

Market leaders are defined by their ability to offer comprehensive, end-to-end solutions that cover the entire spectrum of data

transformation needs. Their vast resources, including state-of-the-art accelerators, enable them to deliver large-scale data modernization projects that integrate seamlessly into complex infrastructures.

Growing importance of efficient management

Adopting hybrid cloud and multicloud strategies can offer numerous benefits and is increasingly being adopted by companies in Brazil. However, for this strategy to thrive, it requires careful management that adeptly orchestrates the different environments, providing a unified vision, which can be quite complex and labor-intensive.

By offering a comprehensive set of CloudOps, vendors can help their customers manage infrastructure, applications and data workloads completely, improving scalability, application efficiency, security and resilience. Solutions such as Google Anthos facilitate workload management in different cloud ecosystems, helping organizations maintain continuous operations and resource optimization.



Executive Summary

FinOps is also a critical capability as cloud spending grows. Managed service providers can also be extremely beneficial in this regard. They combine extensive infrastructure experience, skilled teams, and advanced tools to monitor and enhance the visibility of costs, identify opportunities and resource underutilization, implement controls and safeguards, and provide predictability.

By combining extensive experience and expertise in various verticals alongside advanced Google Cloud technology, providers in Brazil can help organizations build a secure and scalable database, unlocking in-depth insights and AI-driven automation.



 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	Google Cloud Workspace Services
Accenture	Leader	Leader	Leader	Leader	Leader
Almaviva Solutions.	Market Challenger	Leader	Market Challenger	Market Challenger	Market Challenger
Atos	Leader	Leader	Product Challenger	Leader	Product Challenger
Avenue Code	Leader	Not In	Leader	Leader	Contender
BRQ	Leader	Leader	Leader	Rising Star ★	Not In
Capgemini	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
CI&T	Market Challenger	Contender	Product Challenger	Leader	Not In
Claro empresas	Product Challenger	Product Challenger	Contender	Not In	Contender
Deloitte	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In



 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	Google Cloud Workspace Services
DXC Technology	Product Challenger	Product Challenger	Product Challenger	Not In	Not In
FCamara	Contender	Product Challenger	Product Challenger	Not In	Not In
Gentrop	Not In	Not In	Not In	Not In	Leader
GFT	Product Challenger	Not In	Product Challenger	Product Challenger	Not In
Globant	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not In
HVAR	Product Challenger	Product Challenger	Leader	Leader	Not In
IPNET by Vivo	Leader	Leader	Leader	Leader	Leader
Kyndryl	Rising Star ★	Rising Star ★	Rising Star ★	Product Challenger	Not In
Movti	Leader	Leader	Not In	Product Challenger	Leader



 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	Google Cloud Workspace Services
Multiedro	Contender	Contender	Contender	Product Challenger	Rising Star ★
Qi Network	Leader	Not In	Not In	Not In	Leader
Rox Partner	Contender	Contender	Leader	Product Challenger	Not In
Safetec	Not In	Not In	Not In	Contender	Leader
SantoDigital	Leader	Leader	Leader	Leader	Product Challenger
Sauter	Leader	Leader	Leader	Leader	Leader
Servinformación	Not In	Not In	Not In	Not In	Product Challenger
Stefanini	Product Challenger	Product Challenger	Contender	Contender	Not In
TIVIT	Leader	Leader	Product Challenger	Product Challenger	Product Challenger



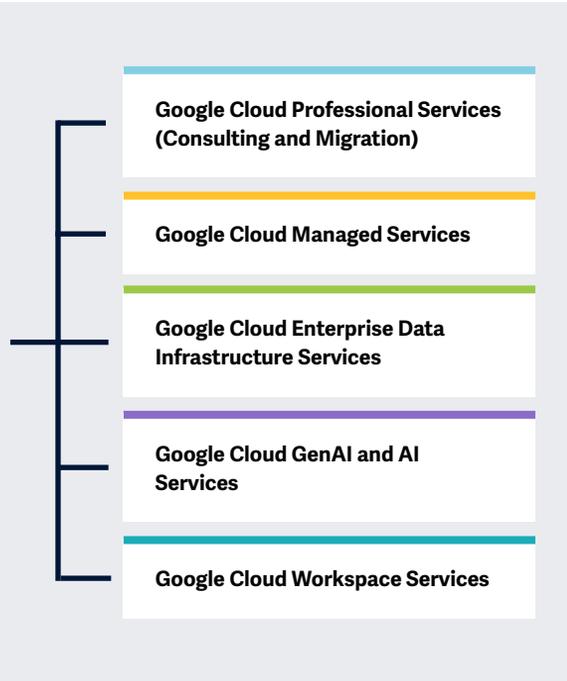
 Provider Positioning

	Google Cloud Professional Services (Consulting and Migration)	Google Cloud Managed Services	Google Cloud Enterprise Data Infrastructure Services	Google Cloud GenAI and AI Services	Google Cloud Workspace Services
uCloud	Product Challenger	Contender	Product Challenger	Product Challenger	Product Challenger
V8.TECH	Product Challenger	Product Challenger	Contender	Contender	Not In
Venha Pra Nuvem	Contender	Contender	Contender	Contender	Contender
Xertica.ai	Leader	Not In	Not In	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 advances and innovations that solidified its leadership in the cloud computing space. From AI advances and enhanced security to a robust multicloud strategy, Google Cloud remains committed to empowering businesses with advanced technologies while delivering scalable and sustainable solutions.

At the forefront of these advances is the integration of GenAI, which has transformed the way businesses interact with data and build applications. Google Cloud has introduced powerful GenAI tools such as Gemini that allow companies to create, redefine and deploy content and applications with unprecedented efficiency. These tools incorporate NLP capabilities that support the development of business use cases across industries and business functions.

Security remains a priority for Google Cloud. In 2024, significant advances were made in this field. By leveraging AI for real-time threat detection, Google Cloud can identify potential security breaches faster than ever before. Advanced encryption methods and robust identity management systems protect sensitive data in the constantly evolving landscape of cyber threats.

Google Cloud has also taken important 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, allowing 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, Google Cloud GenAI and AI Services and Google Cloud Workspace Services.

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

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

APAC includes ANZ, India and ASEAN-6* but excludes Japan, South Korea and China/Taiwan.

*ASEAN-6 - Indonesia, Malaysia, Philippines, Singapore, Thailand and Vietnam

Our study serves as the basis for important decision-making by covering providers' 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 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 Enterprise Data Infrastructure Services

Who Should Read This Section

This report is valuable for service providers offering Google Cloud enterprise data infrastructure services in Brazil, helping them to understand their position in the market, and for companies looking to evaluate these providers. In this quadrant, ISG highlights the current positioning of these providers based on the depth of their service offerings and market presence.

IT leaders

Should read the report to compare providers' abilities to develop and apply data infrastructure solutions using Google Cloud capabilities.

Digital transformation professionals

Should read the report to understand how Google Cloud's enterprise data infrastructure services can contribute to companies' digital transformation.

Data architects

Should read the report to understand how providers' Google Cloud data infrastructure solutions can support enterprise data management and analysis.

Cloud and infrastructure executives

Should read the report to understand how providers' offerings compare in terms of performance, cost and integration with hybrid and multicloud environments.



Google Cloud Partner Ecosystem
Google Cloud Enterprise Data Infrastructure Services

Brazil 2025



This quadrant evaluates providers that offer **data services on Google Cloud**, including the implementation of data lakes and data pipelines, ensuring scalability and performance, while maintaining **security** and **regulatory compliance**.

Adriana Frantz



Definition

This quadrant is a *benchmark* for evaluating vendors based on their offerings in the enterprise data ecosystem and *insights* and decision-making domains. In the enterprise data ecosystem domain, vendors are evaluated for their abilities 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. Data sovereignty is crucial to ensure compliance with regulatory *frameworks* while optimizing resource allocation. In the domain of insights and decision-making, providers are evaluated for their capabilities to enable actionable intelligence, which include fostering predictive analytics for strategic prevention, creating real-time dashboards and *insights* for operational agility and offering hyper-personalization to drive customer engagement and satisfaction.

Eligibility Criteria

1. In-depth technical expertise in Google Cloud solutions, including BigQuery, Cloud SQL and Dataflow;
2. Ability to implement scalable solutions that optimize data performance to handle high-volume workloads;
3. Introduce robust workload management practices while adhering to data sovereignty regulations, allowing companies 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. Specialization in delivering hyper-personalization solutions.



Observations

In 2025, companies' ability to extract insights from data, driven by AI and ML, will be decisive for innovation, the personalization of CX and strategic decision-making. Companies that remain stuck with their local or legacy systems will find it increasingly difficult to remain competitive in an increasingly dynamic and data-driven market.

Consequently, data migrations and modernizations have assumed unprecedented significance, prompting Brazilian providers to invest in accelerators, tools, and methodologies. Additionally, they are adopting Google Cloud resources, including BigQuery, Cloud Storage, and Cloud SQL, to enhance the efficiency of migration while mitigating risks and substantially decreasing costs.

There is also greater demand for DataOps and CI/DC automation to accelerate the ability to collect, cleanse, transform and make information available quickly. DataOps, with its collaborative and process-oriented approach, optimizes this flow, while CI/CD ensures that

changes and updates to data pipelines and models are tested and deployed quickly and reliably.

Finally, services related to data governance and democratization, considered critical to the success of the data journey, continue to gain relevance. Providers can help clients implement data governance policies that ensure compliance with regulations, including GDPR, quality and security. They can also support organizations in broadening the use of data, ensuring that users have access to the appropriate data and know how to use it autonomously.

Of the 90 companies evaluated for this study, 25 qualified for this quadrant, eight of which were Leaders and one a Rising Star

accenture

Accenture offers a variety of innovative solutions for data modernization in Google Cloud, designed to establish modern infrastructures that enable advanced analytics, as well as integrating AI and ML efficiently.



BRQ adopts Google Cloud as one of the bases for data modernization, taking advantage of the scalability, security, flexibility and innovation offered by the platform.



HVAR combines data governance, security and modernization services to help organizations optimize decision-making, ensure regulatory compliance and drive scalable growth through Google Cloud.



IPNET by Vivo has the Data Analytics Specialization in Google Cloud, an indication of its solid competence in using modern data infrastructure compatible with the most advanced data analysis and AI demands.



Rox Partner provides managed data services that guarantee the reliability and readiness of information. Its services also include implementing strict security and compliance policies.



SantoDigital combines a team of data specialists with a proprietary platform to construct data lakes and dashboards more swiftly, enhancing information-driven decision-making.

Sauter Digital

Sauter modernizes data ecosystems in Google Cloud through data warehouse migration, AI-driven analytics and governance, enabling rapid insights, operational efficiency and flexible infrastructures.



kyndryl

Kyndryl (Rising Star) has built a remarkable data portfolio that includes data lake modernization, data warehouse transformation and data governance, privacy and security management solutions.



HVAR



“HVAR is a leader in data infrastructure services for Google Cloud, boasting an impressive range of services, extensive experience and expertise in governance and security.”

Adriana Frantz

Overview

HVAR is based in São Paulo, Brazil. Founded in 2011, it is a consultancy focused on data, analytics and AI solutions. It partners with key public cloud providers in the market and has experience in major technology projects. It is a Google Cloud Premier Partner, with two Specializations in the platform, one of which is Data Analytics. The company recently achieved a milestone, becoming the first company in Latin America to specialize in GenAI through Google Cloud.

Strengths

Extensive data portfolio: HVAR offers a full range of data services for Google Cloud, including transitioning legacy data warehouses to BigQuery, ensuring scalability and efficiency. It also offers various data integration, data management, BI and advanced data analysis services. A notable feature of HVAR is its data environment monitoring platform, which includes real-time operational monitoring and dashboards for performance management control.

Specialized migrations: HVAR has acquired extensive experience in specialized data migrations from legacy systems to services such as CloudSQL, AlloyDB and Spanner, promoting increased agility in decision-making and democratizing access to information throughout the organization.

Emphasis on governance and security:

HVAR develops and implements strategic data governance projects to ensure that clients can use their data consistently and reliably. Its data governance services consist of managing data in corporate environments throughout its entire life cycle, from capture through use or activation to disposal.

Caution

HVAR has a highly mature portfolio and considerable delivery capacity. To further increase its market share and gain more recognition in the market, the company could strengthen its commercial team to achieve more scale.





Appendix

The ISG Provider Lens 2025 – Google Cloud Partner Ecosystem research study 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 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. The data collected for this report represent information that ISG believes to be current as of June 2025 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

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
Lead Author

Adriana Frantz has been with us for over 20 years professional experience in the field financial and technology consulting projects and processes, team management and research leadership. She is a partner senior consultant at TGT Consulting management and technology, with a focus on projects involving digital transformation, complex decisions and business risks.

She works as an analyst and author at ISG, being responsible in Brazil for the studies from Google Cloud Ecosystem, Customer Experienced, Digital Banking and ESG.

Adriana is also a teacher for several degree courses. It is currently doing his doctorate in Administration from the University of São Paulo with a focus on ESG and financial performance and has a master's degree in the same field. In addition In addition, he has a postgraduate degree from FGV and has a degree in Computer Science from UNESP.

Enterprise Context and Global Overview Analyst



Arthur Moura
Research Analyst

Arthur Moura is a Paulista and has entered ISG as Research Analyst in June 2024. Arthur is trained in Administration. Public and is responsible for helping us studies of IPL Latam, ten years of experience working with research of market. Before entering ISG, working in an educational consultancy Also as Research Analyst.

As Research Analyst no ISG Arthur atu in studies like ESG e Sustainability, Digital Businesses and Microsoft Brazil and Microsoft Mexico.



Author & Editor Biographies



Study Sponsor

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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**

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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.





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REPORT: GOOGLE CLOUD PARTNER ECOSYSTEM