ISG Provider Lens™

# Google Cloud Partner Ecosystem

## Google Cloud GenAI and AI Services

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

Customized report courtesy of: HVAR

**QUADRANT REPORT | JUNE 2025 | BRAZIL**

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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.

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

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| | Google Cloud Professional Services (Consulting and Migration) | Google Cloud Managed Services | Google Cloud Enterprise Data Infrastructure Services | Google Cloud GenAI and AI Services | 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

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| | Google Cloud Professional Services (Consulting and Migration) | Google Cloud Managed Services | Google Cloud Enterprise Data Infrastructure Services | Google Cloud GenAI and AI Services | 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

- **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**

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 GenAI and AI Services

### Who Should Read This Section

This report is valuable for service providers offering Google Cloud GenAI and AI services in Brazil to understand their market position and for enterprises 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**

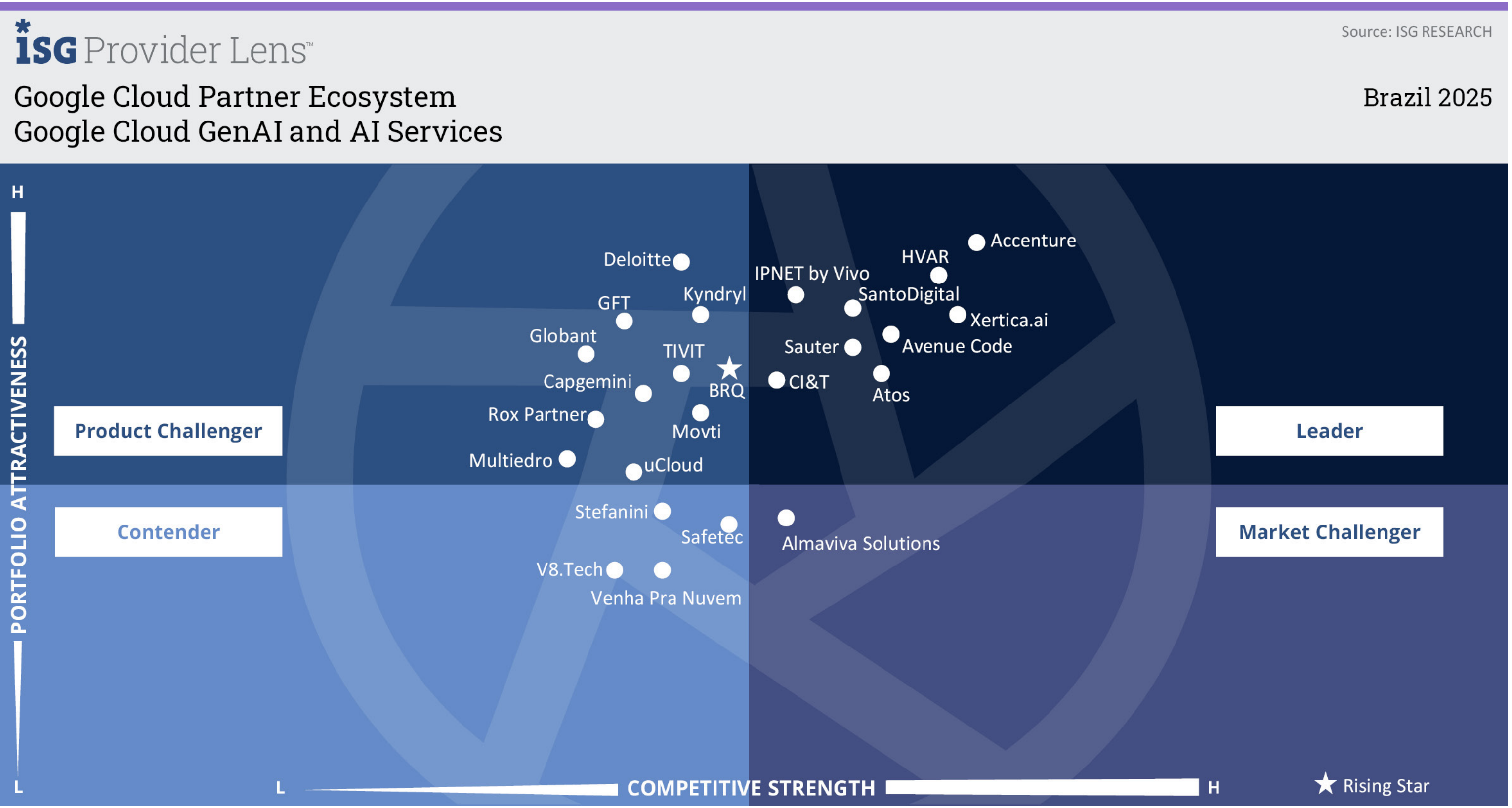
Should read the report to compare providers' capabilities in developing and applying GenAI and AI solutions using Google Cloud resources.

**Software development and technology leaders**

Should read the report to understand how providers have applied new GenAI and AI technologies within Google Cloud.

**Digital transformation professionals**

Should read the report to understand how Google Cloud's GenAI and AI services can contribute to digital transformation initiatives.




This quadrant focuses on assessing vendors' ability to help Brazilian companies **design and develop** innovative, reliable and secure **AI and GenAI solutions** through **Google Cloud resources**.

*Adriana Frantz*

**Definition**

This quadrant evaluates vendors based on their offerings in two main areas: GenAI (Google Gemini) and customized AI and ML solutions, highlighting the ability to deliver secure AI solutions at the enterprise level. In the AI space, vendors are evaluated for their encouragement of responsible GenAI practices, ensuring ethical and bias-free applications. Their specialization in Google's LLM - Gemini - is crucial for encouraging advanced conversational, natural language understanding and multilingual AI capabilities. Vendors must demonstrate relevant GenAI capabilities in using training data, fine-tuning training models and ensuring high response quality. They must also implement different types of RAG models and use efficient generative algorithms and transformers. They should also be proficient in search, retrieval and ranking techniques; content creation, summarization and automation; and reduction of hallucination, irrelevance and inaccuracies.

Providers of customized AI and ML solutions are evaluated based on their ability to deliver solutions that consider GRC, address specific challenges in sectors such as healthcare, finance and retail, and ensure that AI implementations meet enterprise-level safety and compliance standards.

## Eligibility Criteria

1. Expertise in implementing and managing **Google Gemini** to deliver conversational AI capabilities, multilingual support and advanced content generation;
2. Experience in **optimizing Gemini** for various commercial use cases;
3. Focus on **ethical AI** development to ensure bias-free solutions, comply with regulatory standards and be aligned with **Google's guidelines for responsible AI implementation;**
4. Present a history of the promotion of multimodal and multimodel GenAI in search, retrieval, ranking techniques, refinement, RAG developments, content creation, summarization, workflow automation, efficient SLMs and new generative technique applications;
5. Ability to build, deliver, maintain and scale **hybrid/mixed model LLMS** and **AI agent solutions** for enterprises;
6. Ability to implement **GRC and security frameworks** to ensure adherence to data privacy regulations by sectors;
7. Experience in **applying Google Cloud GenAI services** to solve complex business challenges.

**Observations**

2024 was still marked by the challenge of demonstrating GenAI's economic value and convincing customers of the technology's benefits. The rapid experimentation and prototyping of solutions developed with Gemini demonstrated gains in productivity and efficiency, making organizations more likely to adopt the technology. However, the costs associated with implementing GenAI can be significant and remain a barrier to intensive use of the technology. Vendors can help customers reduce the cost of applications in a number of ways, from optimizing infrastructure and data management to choosing the most suitable models, optimizing prompts and using *fine-tuning* for specific tasks.

Ethical and regulatory compliance issues related to AI continue to demand attention from providers. Leaders have demonstrated a commitment to responsible AI practices, ensuring that solutions are transparent, fair and accountable. Building a solid ethical framework is key to increasing trust in the use of AI.

The most popular trend to emerge from this year's study is the rise of AI agents and multiagent systems, enabling automation, intelligent decision-making and AI-driven optimization of processes. Some Brazilian providers have shown themselves to be pioneers on this front and report that they are actively investing to expand their capabilities in Google's Agentspace and explore use cases that could create innovative solutions in various sectors in the future.

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

accenture

**Accenture** continues to expand its alliance with Google Cloud and remains a pioneer in the adoption of emerging technologies. The company demonstrated progress in using Google Agentspace to create agents that meet the needs of various industries.

Atos

**Atos** is investing significantly in R&D, capacity building and training to expand its offering of GenAI and AI services on Goolge. The company has already started developing AI agents based on Agentspace in various use cases.

Avenue Code

**Avenue Code** has been able to rapidly scale its AI services to Google Cloud over the past year and demonstrates substantial knowledge and capabilities across the entire AI solution stack, including GenAI, AutoML and MLOps.

CI&T

**CI&T** combines a proprietary platform and a highly qualified team to streamline the delivery of AI solutions that deliver concrete results aligned with business goals.

HVAR

**HVAR** is the first consultancy in Latin America to achieve Google Cloud's Generative AI Specialization. It offers a range of services designed for responsible AI adoption, resulting in improved performance and reduced costs.

ipnet by vivo

**IPNET by Vivo** was recently recognized as a Google Cloud Partner Awards 2025 winner in the Artificial Intelligence category. The company works closely with Google Cloud to bring the platform's advanced features to customers in different industries.

Santo Digital

**SantoDigital** has AI development services that are fully customized to meet the needs of each sector. The company has also developed managed services that ensure improved AI governance.

### Sauter Digital

**Sauter** provides a complete solution that encompasses automation, predictive analytics and ML to extract *insights* from large volumes of data. It has also developed an interesting contact center portfolio for companies of different sizes.

### Xertica.ai

**Xertica.ai** transforms operations with GenAI on Google Cloud through accelerators designed for various industries. The company is investing in AI agents in Google Agentspace to extend AI-powered automation.

**BRQ** (Rising Star) uses its FusionAI platform to accelerate the development cycle of GenAI applications. Its results-oriented approach helps align AI initiatives with business objectives.

Leader

"HVAR is a pioneer in Latin America with its GenAI Specialization in Google Cloud, transforming challenges into business opportunities and fostering a culture of innovation."

*Adriana Frantz*

# HVAR

### Overview

HVAR is based in São Paulo, Brazil. Founded in 2011, it is a consultancy focused on data, analytics and AI solutions. It maintains partnerships with key public cloud providers and has experience in major technology projects. It is a Google Cloud Premier Partner, with two Specializations in the platform, one of which is Generative AI. The company has been expanding its range of technology services in recent years and has significantly strengthened its partnership with Google Cloud, achieving recognition as one of the key providers in the ecosystem.

### Strengths

**GenAI Specialization:** HVAR is the first consultancy in Latin America to be awarded the GenAI Specialization by Google Cloud. This achievement is a very important milestone for the company and was widely reported in the Brazilian media. The Specialization is proof of the company's technical expertise in high-impact AI projects and its ability to deliver, demonstrated by the presentation of numerous success stories.

**Focus on innovation:** HVAR invests in R&D to develop solutions and frameworks that accelerate its projects, especially with GenAI. The company is at the forefront of testing new Google Cloud services and resources, such as Spanner, Agentspace, GenAI4SAP, CCaaS and MDE, ensuring that its clients have easy access to new technologies. The company has also positioned itself as a technical reference by producing content, participating in Google events and publishing several articles in the media.

**Broad offering:** HVAR offers a variety of services and solutions designed to help clients improve their AI capabilities and maturity using Google tools. Its portfolio includes consulting services focused on AI use cases, risk assessment and responsible AI, solutions for AI development, implementation and governance, performance management and cost optimization.

### Caution

HVAR has made great strides in developing AI solutions in Brazil, with important achievements in Google Cloud. It is expected that this progress and continued investment in communication actions will lead to increased brand recognition in the market.

# 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.

**Study Sponsor:**
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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*

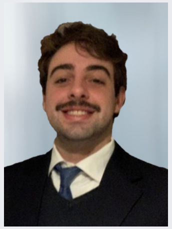
## Adriana Frantz
**Lead Author**

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 Paulist 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.

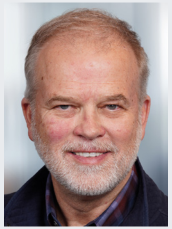
*Study Sponsor*

## Aman Munglani

**Director Ecosystem Studies,**
**Custom Research & Digital innovative series**

A recognized thought leader and industry advisor with over 23 years of experience in emerging technologies, Emerging vendors and infrastructure, Aman Munglani has spent much of his professional life advising the C-suite of Global 2000 companies on digital strategies, start-up engagement, innovation, technology roadmaps and vendor management. Prior to ISG, Aman spent twelve plus years at Gartner guiding CIOs and IT managers across Asia Pacific and Europe on emerging technologies, their use cases and maturity, infrastructure trends and technologies, vendor comparisons, and RFP reviews.

He also advised many global and Asia-Pacific vendor organizations on their go to market, product and pricing strategies and applicable competitive scenarios.



*IPL Product Owner*

## Jan Erik Aase

**Partner and Global Head – ISG Provider Lens™**

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

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

## ISG Provider Lens™

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

For more information about ISG Provider Lens™ research, please visit this webpage.

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## ISG

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

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

For more information, visit isg-one.com.

**JUNE, 2025**

**REPORT: GOOGLE CLOUD PARTNER ECOSYSTEM**