

Google Cloud Partner Ecosystem

A study evaluating Google Cloud partners' capabilities
in AI and data-driven transformation



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In 2026, the Google Cloud partner ecosystem is entering a decisive phase as the market shifts from GenAI experimentation to enterprise-scale, agentic AI execution. Building on Google Cloud Next '26, Google is advancing a unified AI stack centered on Gemini Enterprise, its Agent Platform and AI-optimized infrastructure, enabling partners to govern autonomous workflows at scale. As AI and agent-led architectures gain traction, providers translate innovation into outcomes across advisory, implementation and managed services.

Google Cloud expands AI-optimized infrastructure with next-generation TPUs and a global network to support data-intensive workloads, while Agentic Data Cloud strengthens partners' ability to deliver real-time insights and manage complex multicloud environments. Increased focus on security, compliance and digital sovereignty positions partners to deliver trusted, governance-led

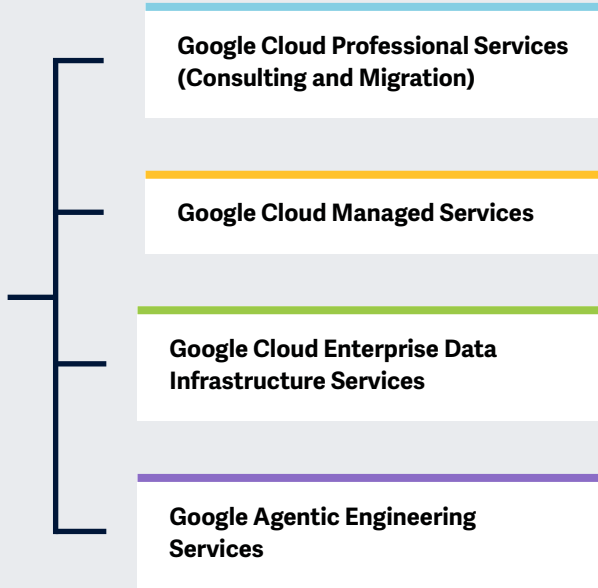
transformations in regulated industries. Google's three-tier partner model, with Diamond as the highest tier, reinforces differentiation based on capabilities and customer outcomes.

As enterprises accelerate cloud adoption and modernization, partners are moving beyond migration and integration toward AI-driven transformation, industry solutions and continuous optimization. Close collaboration with Google FDEs, combined with more than \$700 million in partner investments and ecosystem support, helps providers address complex challenges, accelerate AI deployment and scale AI-native offerings. This study evaluates partner capabilities across professional services, managed services, enterprise data infrastructure and agentic engineering services in a competitive AI-first cloud landscape.



Key focus areas for Google Cloud Partner Ecosystem 2026 study.

Simplified Illustration Source: ISG 2026



The ISG Provider Lens® Google Cloud Partner Ecosystem 2026 study offers the following to business and IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on the APeJCK, Brazil, Europe and U.S. markets

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

Note: APeJCK stand for Asia Pacific excluding Japan, China and Korea



CORNERSTONES QUADRANTS

Innovation IP Accelerators
Partnerships Tiers Types
Competency and Talent Resources Certifications
Responsible AI – Ethical AI – Green AI
Industry Focus and Alignment
Experience and Engagement
ESG – GRC – Security – Sovereignty
Change Mgmt. Organization Technical Process

GC Professional Services (Consulting and Migration)
GC Managed Services

Consulting & Business Transformation (Business and Technology)	
Google Cloud Offerings (Adoption & Fitment)	Agentic Modernization (Discovery & Use Cases)
Cloud Operations (Gemini Cloud Assist, etc.)	AgentOps
	DataOps ModelOps
	LLMOps AI FinOps
Observability & Orchestration	

Architecture (Design and Build)	
Integrated Architecture (Compute – Storage-Network)	Cloud Solutions (Industry – Sovereign)
Performance & Optimization	
Integrated Architecture (Compute – Storage-Network)	IaaS SRE – PRE PaaS

Migration and Multi Cloud Integration (Cross-Cloud / GKE Enterprise, etc.)	
Applications and Data Workloads	Agentic Migration & Orchestration
Full-stack/ Integrated / Extended Stacks Monitoring (hardware infra to services ops)	
Performance Benchmarking	Run Cost Optimization

Knowledge Mgmt. – AI Experience (Gemini Enterprise for CX, etc.)

GC Enterprise Data Infrastructure Services

Enterprise Data Ecosystem	
BigQuery – AlloyDB AI – Cross-Cloud Lakehouse, etc.	Workload Mgmt. – Data Sovereignty
Data Process Lifecycle Mgmt.	

Business Intelligence & Decision-making		
Predictive Analytics	Dashboards & Real-time Insights	Hyper Personalization
Data Value Lifecycle Mgmt.		

Continuous Data & Feedback Loop
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Google Agentic Engineering Services
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Foundation Models, Multimodal & Agentic AI		
Multi-Agent Systems (Planning – Reasoning – Execution)		FDE for Google AI Customization
Agentic IDE – ADK (Antigravity)	Agent Interoperability (A2A, MCP, etc.)	Agentic Sovereignty
Full Stack Agentic AI Engineering (Gemini, TensorFlow etc.)		Run Cost Optimization

Customized ML Solutions	
Industry-specific and Point Solutions	Enterprise LLM

**Agentic Data Cloud & Gemini Enterprise
(Cross-cloud Lakehouse – Agentic Engineering – End-to-end System of Agents)**

Forward Deployment Engineering

Agentic Data Cloud & Gemini Enterprise(Cross-cloud Lakehouse – Agentic Engineering – End-to-end System of Agents)



Definition

This quadrant evaluates providers that offer consulting, integration, migration and implementation services for Google Cloud. Providers are assessed on their ability to translate enterprise objectives into cloud, data and AI transformation roadmaps, including workload modernization, application migration and agentic use case prioritization. The scope covers architecture design, sovereign-ready and industry-specific solutions, cross-cloud interoperability, security and compliance alignment, and the use of Google Cloud services such as GKE, Anthos and data platforms where relevant. Differentiation is based on proven transformation methods, certified talent, reusable accelerators and measurable business outcomes. The quadrant represents the strategy and delivery layer that enables enterprises to modernize applications, data foundations and operating models on Google Cloud.

Eligibility Criteria

1. Demonstrate certified Google cloud expertise across **architecture, AI and ML, containers, data and multicloud environments**
2. Provide **end-to-end consulting, migration, integration and implementation** services for google cloud
3. Apply proven **transformation frameworks** aligned with business and industry outcomes
4. Design **scalable, secure and sovereign-ready architectures** across compute, storage, network and data services
5. Execute large-scale **application and data migrations** with minimal business disruption
6. Support **cross-cloud interoperability, portability** and governance across hybrid cloud and multicloud environments
7. Showcase **enterprise-scale client references**, measurable outcomes and sufficient data availability



Definition

This quadrant assesses providers that deliver managed services for Google Cloud environments across IaaS, PaaS and related cloud-native services. Providers are evaluated on their ability to operate, optimize and continuously improve production environments single, hybrid and multicloud environments. The scope includes observability, orchestration, incident management, automation, lifecycle management, performance engineering, SRE and PRE practices, FinOps and AI workload operations. Differentiation is based on integrated tooling, run-cost optimization, resilience, scalability and the ability to manage data, model and agentic workloads in production. The quadrant helps enterprises identify partners that can maintain reliable, secure and cost-efficient Google Cloud operations while supporting continuous modernization and evolving workload demands.

Eligibility Criteria

1. Demonstrate **certified Google Cloud managed services capabilities** across infrastructure, platform, data and AI workloads
2. Operate hybrid cloud and multicloud environments with **consistent governance, monitoring and integration**
3. Support **AgentOps disciplines** such as DataOps, ModelOps, LLMOps and AI FinOps
4. Have proven experience in **migrating and operating business-critical applications and data workloads** on Google Cloud
5. Apply **SRE and PRE practices** for reliability, scalability, performance and incident management
6. Provide **observability, orchestration, automation and lifecycle management** across cloud services
7. Show mature FinOps capabilities, including **run-cost optimization and AI workload cost control**
8. Provide **enterprise client references, managed services KPIs** and sufficient operational data for evaluation
9. Showcase expertise in AI- and data-driven innovation, including deployment and operation of **advanced AI workloads and enterprise modernization initiatives**
10. Participate in **Google Cloud partner programs** and strategic initiatives



Definition

This quadrant evaluates service providers that deliver enterprise data infrastructure services on Google Cloud. Providers are assessed on their ability to design, build, modernize and manage scalable, secure and interconnected data ecosystems across hybrid cloud, multicloud and sovereign environments.

The scope include ingestion, integration, processing, storage, governance, metadata management, lineage, access control and optimization supported by Google Cloud platforms such as BigQuery, Dataplex, BigLake and AlloyDB. Differentiation is based on real-time analytics, AI and ML enablement, industry-specific data solutions, automation and measurable business impact. The quadrant helps enterprises identify partners that can turn fragmented data estates into governed, AI-ready foundations for insight, decision-making and continuous value creation.

Eligibility Criteria

1. Demonstrate **expertise in Google Cloud data platforms** such as BigQuery, AlloyDB AI, Dataplex and BigLake
2. Provide **end-to-end data lifecycle services** spanning ingestion, processing, governance and optimization
3. Support hybrid, multicloud and **sovereign data environments with workload management** across regions
4. Deliver secure data architectures with **access controls, lineage, metadata management and compliance support**
5. Enable **real-time, predictive and prescriptive analytics** for decision-making
6. Build **AI/ML-ready data foundations and support hyper-personalization** or industry specific use cases
7. Offer strong expertise in **data lineage, metadata management and governance frameworks**
8. Show **measurable client impact, reusable accelerators and sufficient data** availability for evaluation



Definition

This quadrant evaluates service providers that deliver Google Cloud-based agentic engineering services. Providers are assessed on their ability to design, build, integrate and operate multi agent systems that support planning, reasoning, execution and orchestration across enterprise workflows. The scope includes the use of Google Cloud's AI stack, including Gemini, Vertex AI, TensorFlow and agent development tools such as ADK or equivalent frameworks, as well as interoperability standards such as A2A and MCP. Differentiation is based on production-grade engineering, security, governance, agentic sovereignty, reusable accelerators, FDE-style co-creation models and measurable business outcomes. The quadrant helps enterprises identify partners that can move agentic AI from pilots into secure, scalable and industry-aligned operating environments.

Eligibility Criteria

1. Demonstrate capabilities in **designing, deploying and operating multi-agent systems**, across planning, reasoning and execution
2. Use **Google Cloud AI technologies** such as Gemini, Vertex AI, TensorFlow and agent development frameworks
3. Deliver solutions leveraging **agentic development tools** (such as ADK, Antigravity or equivalent)
4. Support **agent interoperability standards** such as A2A, MCP or equivalent integration approaches
5. Provide **measurable business outcomes** from AI-led initiatives
6. Provide **secure, governed and sovereign-ready** agentic AI architectures
7. Deliver **industry-aligned solutions, accelerators and reusable assets** for agentic workflows
8. Demonstrate innovation roadmaps in **multimodal AI and customized ML solutions**
9. Show **engineering talent, certifications and ongoing investment** in multimodal AI and custom ML capabilities
10. Show investments in **AI innovation and capability development**



Quadrants by Regions

As a part of this ISG Provider Lens® quadrant study, we are introducing the following four quadrants on the Google Cloud Partner Ecosystem 2026:

Quadrant	APeJCK	Brazil	Europe	U.S.
Google Cloud Professional Services (Consulting and Migration)	✓	✓	✓	✓
Google Cloud Managed Services	✓	✓	✓	✓
Google Cloud Enterprise Data Infrastructure Services	✓	✓	✓	✓
Google Agentic Engineering Services	✓	✓	✓	✓



The research phase falls in the period between June and August 2026, during which survey, evaluation, analysis, and validation will take place. The results will be presented to the media in October 2026.

Milestones	Beginning	End
Survey Launch	June 30, 2026	
Survey Phase	June 30, 2026	July 31, 2026
Sneak Preview	October 2026	
Press Release & Publication	December 2026	

Please refer to the [ISG Provider Lens® 2026 research](#) agenda to view and download the list of other studies conducted by ISG Provider Lens®.

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Buyers Guide

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Google Cloud Partner Ecosystem IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2026. For more information, refer to the [Buyers Guide research schedule](#).

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens® reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
star@cx.isg-one.com



ISG Star of Excellence



The ISG Provider Lens® 2026 – Google Cloud Partner Ecosystem research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Study Sponsor:

Heiko Henkes

Lead Analysts:

Sonam Chawla, Maharshi Pandya, Adriana Frantz, Shubham Kumar, Dr. Tapati B and Sameen Siddique

Research Analysts:

Sandya Kattimani, Viraj V Narvekar and Samara Santos

Data Analyst:

Akshay Rathore

Project Manager:

Monika Pathak

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

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



Contacts For This Study

Study Sponsor



Heiko
Henkes

**Director and Principal
Analyst**



Sonam
Chawla

**Lead Analyst –
APeJCK**



Maharshi
Pandya

**Lead Analyst –
APeJCK**



Adriana
Frantz

**Lead Analyst –
Brazil**



Shubham
Kumar

**Lead Analyst –
Europe**



Dr. Tapati B

**Lead Analyst –
U.S.**



Sameen
Siddique

**Lead Analyst –
U.S.**



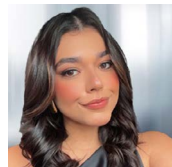
Sandya
Kattimani

**Research Specialist –
APeJCK and Europe**



Viraj V
Narvekar

**Research Specialist –
U.S.**



Samara
Santos

**Research Specialist –
Brazil**



Akshay
Rathore

Data Specialist



Monika
Pathak

Project Manager



ISG Provider Lens® Advisors Involvement Program

ISG Provider Lens® offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process.

The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study



Kevin
Spiekermann

**Principal Consultant –
Europe**



Salih
Aksan

**Consulting Manager -
Europe**



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

66degrees*	Cloud Ace*	Fractal Analytics*	intelia*
Accenture*	Cloud4C*	Genpact*	IPNET by Vivo*
Aliz Technologies*	Cloudmile	Gentrop*	Kyndryl*
Almaviva*	Cloudside*	GFT*	LTM*
Altimetrik	Cognizant*	Globant*	Mantel Group*
Appsbroker	Computacenter*	Go Reply*	Movti*
Artefact	Datonic*	GoPomelo	Mphasis*
Atos*	Datwave	Grid Dynamics*	Multiedro*
Avenue Code*	Deloitte*	HCLTech*	NCS Group*
Brillio*	Devoteam G Cloud*	Hexaware*	Nordcloud
BRQ*	DXC Technology*	HVAR*	NTT DATA*
Capgemini*	emergya*	IBM*	Onix Networking
CDW	Endava	Infogain*	PCG*
CI&T*	EPAM	Infosys*	Perficient
Claro empresas*	FCamara*	Innova Solutions*	Persistent Systems*



If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

Pluto7	Safetec*	Team Computers*	Visionet
PointStar	SantoDigital*	Tech Mahindra*	VVDN Technologies*
Premier Cloud	Sauter*	Telana (Ancoris)*	Wipro*
Publicis Sapient	Searce*	ThoughtWorks*	Xebia
PwC*	Servinformación *	Tiger Analytics	Xertica*
Pythian*	SFEIR*	TIVIT*	Zencore
Qi Network*	Slalom*	Tredence Inc.	Zoi
Quantiphi*	Softchoice	Tridorian	
Quodea*	SoftServe*	T-Systems*	
Rackspace Technology*	Sopra Steria*	uCloud*	
Revolvy*	Stefanini*	V8.TECH*	
Rox Partner*	Sutherland	Venha Pra Nuvem*	
Sabio*	TCS*	Virtusa*	



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](#).

Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

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, 2026



BROCHURE: GOOGLE CLOUD PARTNER ECOSYSTEM