

System Integrator (SI) Capabilities on Google Cloud Platform (GCP) Services Compendium 2021

December 2020: Complimentary Abstract / Table of Contents



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In addition to a suite of published research, a membership may include

- Accelerators™
- Analyst access
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- PriceBook
- Virtual Roundtables
- Workshops

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | system integrators, locations, risk
- Other | Market intelligence, system integrator capabilities, technologies, contract assessment

Contents

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Background of the research

- Enterprise consumption of cloud has experienced a dramatic shift, from a skeptical outlook to going all in on public cloud, in the last few years. More than 90 percent of enterprises already leverage one or more public clouds in their enterprise environment
- COVID-19 has further accelerated enterprise migration to public cloud as most enterprises saw clear business continuity benefits during the pandemic. Contrary to an expected slowdown due to COVID-19, most enterprises have accelerated their digital transformation efforts, with migration to public cloud being a key transformation lever
- Despite being a late entrant when compared to AWS and Azure, GCP has registered good growth and captured a meaningful share in the hyperscaler market. GCP's innovation-driven culture and offerings across infrastructure, platforms, data, and next-generation segments have helped it create a niche amongst the hyperscalers. With the recent restructuring of sales team and renewed go-to-market strategy, GCP has seen a spike in demand for its offerings. Rapid adoption, coupled with management complexities and talent crunch, is pushing enterprises to seek third-party support. System integrators help enterprises in navigating the GCP landscape across infrastructure, platform, data, and next-generation technology segments
- In this research, we present an assessment of 18 GCP cloud system integrators featured on the SI capabilities on GCP PEAK Matrix®

The assessment is based on Everest Group's annual RFI process conducted over 2020, interactions with GCP system integrators, client reference checks, and an ongoing analysis of the cloud services market.

This report assessed the following 18 system integrators on the GCP PEAK Matrix® Assessment 2021:

- **Leaders:** Accenture, Atos, HCL Technologies, Infosys, TCS, and Wipro
- **Major Contenders:** Capgemini, Cloudreach, Cognizant, DXC Technology, GFT, Mphasis, NTT DATA, Sopra Steria, and Virtusa
- **Aspirants:** Aspire Systems, Coforge, and UST Global

Scope of this report:



Geography
Global

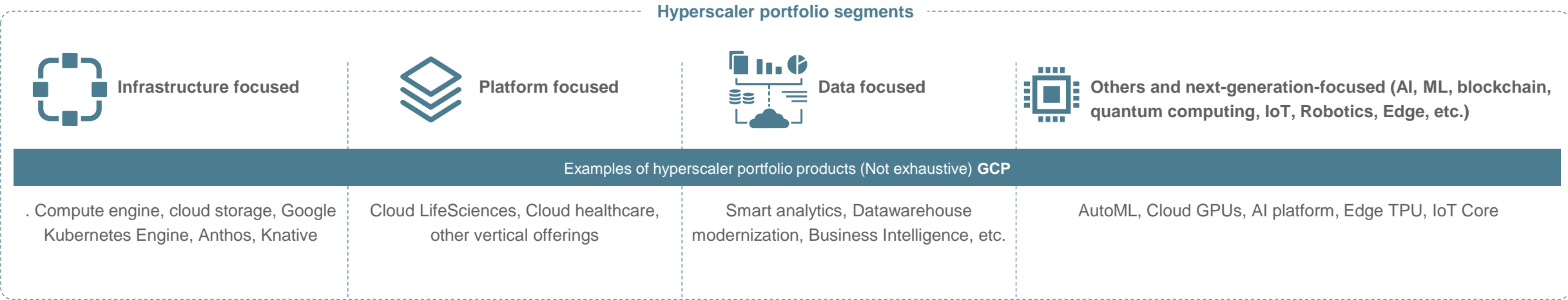
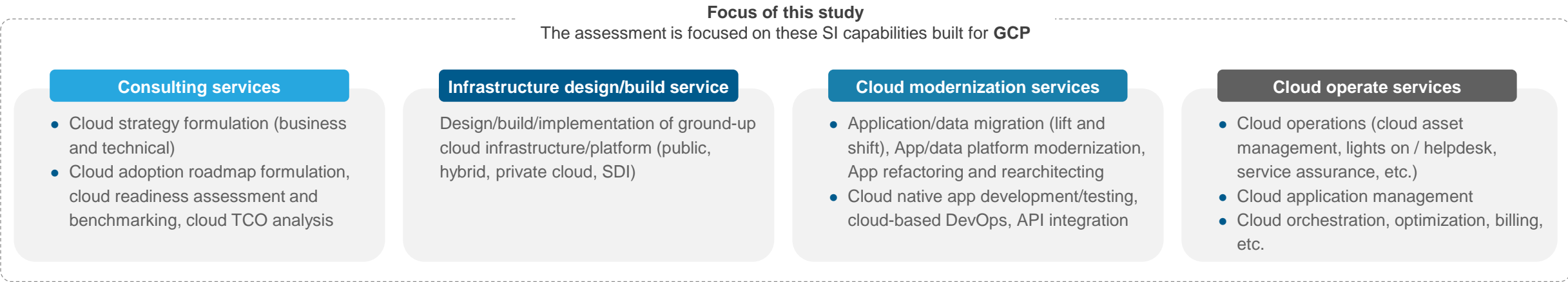


System integrators
18 leading cloud system integrators



Services
Cloud services

This report focuses on SI capabilities on GCP services and offers insights into the prominent system integrators operating in this space



SI capabilities on GCP services compendium report has over 18 system integrator profiles

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System Integrator | system integrator capabilities on GCP (page 1 of 5)

Everest Group assessment – Leader

Market impact

Market adoption

Portfolio mix

Value delivered

Overall

Strengths

- It has acquired company X and company Y to expand its delivery capabilities in Europe
- Service provider has 3 GCP accreditations including application development, DevOps, data analytics, and Kubernetes
- Clients have identified strategy development, knowledgeable talent pool, cost optimization, and client management as key strength areas

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Overall cloud services overview

Cloud services vision:

System Integrator's cloud services vision is to become an ideal partner to help clients in their transformation journey, offering cloud native, cloud SaaS, data and analytics, cloud security, and migration services.

Overall cloud services revenue (2019)

<US\$200 million

US\$200-500 million

US\$500 million – US\$1 billion

>US\$1 billion

Adoption by geography

High (>25%)

Moderate (10-25%)

Low (<10%)

Source: Everest Group (2020)

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System Integrator | system integrator capabilities on GCP (page 3 of 5)

Capabilities on GCP overview

GCP partnership overview:

System Integrator has a partnership with Google since 2014, collaborating to bring best-in-class enterprise products to market in a quest to help enterprises evolve into "digital first" businesses.

Revenue from GCP-related services (2019)

<US\$50 million

US\$50-200 million

US\$200-500 million

>US\$500 million

GCP portfolio – key highlights (representative list)

- It is accredited with "Cloud Security Specialization" badge
- It has invested extensively in development of GCP cloud-ready professionals. TCS has 750+ certified associates
- Key use cases delivered on Azure include:
 - Application and infrastructure transformation on GCP
 - Smart highway implementation
 - SAP on GCP

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Key solutions

Proprietary solutions (representative list)

Solution name	Details
Solution 1	A multi-cloud provisioning, orchestration, management
Solution 2	A framework used to migrate applications in an autom
Solution 3	Provides end-to-end automation of hybrid cloud enviro
Solution 4	Provides application cloud readiness assessment, fol
Solution 5	Helps solve point functional problems across enterpri

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Case study, investments, and recent activities

Case study

Aerospace manufacturer transforms to a quick and modern environment while complying with strict regulations

Client

An aerospace manufacturer

Business challenge

The client experienced operational and staff support issues with its internally managed mainframe platform that runs 80% of its revenue. Their primary requirement was a partner with deep platform knowledge and keen understanding on how to navigate regulatory and compliance laws.

Solution

- Discovery & dependency mapping
- Application rationalization
- XXX analysis & cloud cost comparison

Impact

Impact

- Achieved XXX faster migration
- Achieved XXX automation
- No disruptions and rollbacks

Recent investments and activities (representative list)

Development

Details

Invested in its talent to build cloud expertise through internal trainings and enabling them to deliver customer projects supported by its partners. The firm also invests in hosting webinars, summits, and conferences to enhance and showcase its cloud capabilities

Talent

Invested in its talent to build cloud expertise through internal trainings and enabling them to deliver customer projects supported by its partners. The firm also invests in hosting webinars, summits, and conferences to enhance and showcase its cloud capabilities

Capability enhancement

- Invested in developing its AI/ops integrated management platform, XXX. The managed services AI/ops platform provides IT services solution, operational analytics, business service dashboards, contract, and reporting by accelerating quick services onboarding, and increases services availability by self-healing of IT datacenter & cloud issues
- System integrator has invested in transforming all its business functions digitally by developing applications to be used for sales, HR, finance, marketing, etc
- Dedicated cloud CoE to explore cloud application transformation and related services with focus on building solution accelerators/framework for cloud and POC/pilots for new cloud technologies

Research calendar

Cloud and Infrastructure Services (CIS)

Published Planned Current release

Flagship CIS reports

	Release date
Network Transformation and Managed Services PEAK Matrix® Assessment 2020 – Focus on Communications Service Providers	March 2020
IT Security Services PEAK Matrix® Assessment 2020	June 2020
Combating COVID-19 Through Infrastructure-led Transformation	July 2020
Digital Trust – The Cornerstone of Creating a Resilient and Truth-based Digital Enterprise	August 2020
Digital Workplace Services PEAK Matrix® Assessment 2020	August 2020
Aware IT Infrastructure Automation Services PEAK Matrix® Assessment 2020	October 2020
System Integrator Capabilities on AWS PEAK Matrix® Assessment 2021	November 2020
System Integrator Capabilities on AWS Services Compendium 2021	November 2020
System Integrator Capabilities on Microsoft Azure PEAK Matrix® Services Assessment 2021	November 2020
System Integrator Capabilities on Microsoft Azure Services Compendium 2021	December 2020
System Integrator (SI) Capabilities on Google Cloud Platform (GCP) PEAK Matrix® Services Assessment 2021	December 2020
System Integrator (SI) Capabilities on Google Cloud Platform (GCP) Services Compendium 2021	December 2020

Thematic CIS reports

	Release date
Connected Workplace – The Next Experience Frontier	January 2020
Enterprise Pulse Report: The Dissatisfaction Conundrum	January 2020
Upcoming Contract Renewals – Infrastructure Services	March 2020

Note: For a list of all our published CIS reports, please refer to our [website page](#)



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