Everest Group Google Cloud Services Specialists PEAK Matrix® Assessment 2025

Focus on Onix

November 2025

Background of the research

Enterprises seeking Google Cloud services are moving past lift and shift toward AI-native modernization on Google Cloud, pairing BigQuery-centric data platforms with Kubernetes (GKE) and Cloud Run to re-platform analytics and applications at pace. Enterprise feedback underscores why: rapid data center exits and containerized runways, plus measurable cost and performance gains as teams standardize on toolchains for repeatable automation. Industry pull is visible where Google Cloud's data and streaming strengths matter and modernizations that blend compliant landing zones with analytics acceleration.

Against this backdrop, Google Cloud specialists are winning by stitching together data, AI, and platform engineering value proposition into outcome-oriented delivery. Enterprises expect providers to co-create industry blueprints with clients, embed FinOps into managed services, and prove end-to-end maturity from build to run.

In the research, we present an assessment and detailed profiles of 12 GCP Service Providers (SPs) featured on the Google Cloud Services Specialists PEAK Matrix® Assessment 2025. The assessment is based on Everest Group's annual Request for Information (RFI) process for the calendar year 2025, interactions with leading Google Cloud SPs, client reference checks, and an ongoing analysis of the cloud services market.

The full report includes the profiles of the following 12 leading GCP specialist providers featured on the GCP Services Specialists PEAK Matrix:

- **Leaders:** 66degrees, Egen, Onix, and Quantiphi
- **Major Contenders:** Datatonic, Factspan, Grid Dynamics, Revolgy, Searce, and Zencore
- **Aspirants:** Promevo and Xertica

Scope of this report

Geography: global

Industry: all-encompassing industries globally

Services: Google Cloud

Category: specialists

Google Cloud services specialists PEAK Matrix® assessment 2025: definition and scope

Consulting/assessment services

- Strategy formulation, TCO analysis, cloud adoption roadmap, and cloud security consulting
- Public cloud feasibility assessment, vulnerability assessment, and security framework assessment

Design/implementation services

- Design, build, implement, and integrate with public cloud infrastructure
- App/Workload lift and shift, modernization, Google Cloud-native application development, integration of workloads with Google Cloud services, and API integration

Operate services

- Monitoring, automation, and configuration support for workloads
- Management, capacity planning, optimization services such as DevSecOps, AIOps, and FinOps

Description of Google Cloud portfolio segments

Core infrastructure	Analytics & AI	Application development and delivery	Security	Use case-specific solutions
Includes solutions focusing on foundational building blocks	Includes solutions focusing on data analysis, machine learning, and artificial intelligence	Includes tools and solutions for building and deploying applications	Includes solutions augmenting security features to protect data, applications, and infrastructure	Includes ready-to-use solutions tailored to specific horizontal and vertical use cases
Examples of AWS portfolio segments				
Google Cloud Compute Engine, Google Kubernetes Engine (GKE), Cloud Storage, etc.	AutoML, BigQuery, Blockchain Node Engine, Cloud Dataflow, Google Cloud Pub/Sub, Google Cloud Firestore, Vertex AI, etc.	App Engine, Cloud Build, Cloud Endpoints, Cloud Functions, Cloud Run, Firebase, etc.	Cloud Armor, BeyondCorp Enterprise, Security Command Center, Key Management Service (KMS), Chronicle, etc.	**Function-specific solutions:** Contact Center AI, Document AI, etc. **Industry-specific solutions:** Retail Search, Supply Chain Twin, etc.

Google Cloud services specialists PEAK Matrix® characteristics

Leaders

66degrees, Egen, Onix, and Quantiphi

- Leaders demonstrate strong technical excellence and Google-native engineering capabilities, enabling them to deliver enterprise-scale modernization and AI transformation programs
- They are investing in gen AI accelerators and pre-built frameworks that enhance time-to-value and strengthen alignment with Google Cloud's AI and data ecosystem
- Leaders show deep verticalization and IP-led delivery maturity, translating Google Cloud's innovation into measurable business impact for clients
- While technically advanced, Leaders need to expand managed services scale, compliance maturity, and repeatable IP commercialization to sustain leadership across regulated markets

Major Contenders

Datatonic, Factspan, Grid Dynamics, Revolgy, Searce, and Zencore

- Major Contenders are advancing Google Cloud adoption through data modernization, AI engineering, and modular IPs that accelerates transformation outcomes
- They are building credible gen AI-led use cases and domain-specific solutions, strengthening differentiation within Google Cloud's partner ecosystem
- Their agile delivery and flexible engineering models make them reliable transformation partners for mid-market and emerging enterprise clients
- To move toward leadership, these vendors must deepen security and compliance capabilities, broaden managed services maturity, and enhance global delivery scalability

Aspirants

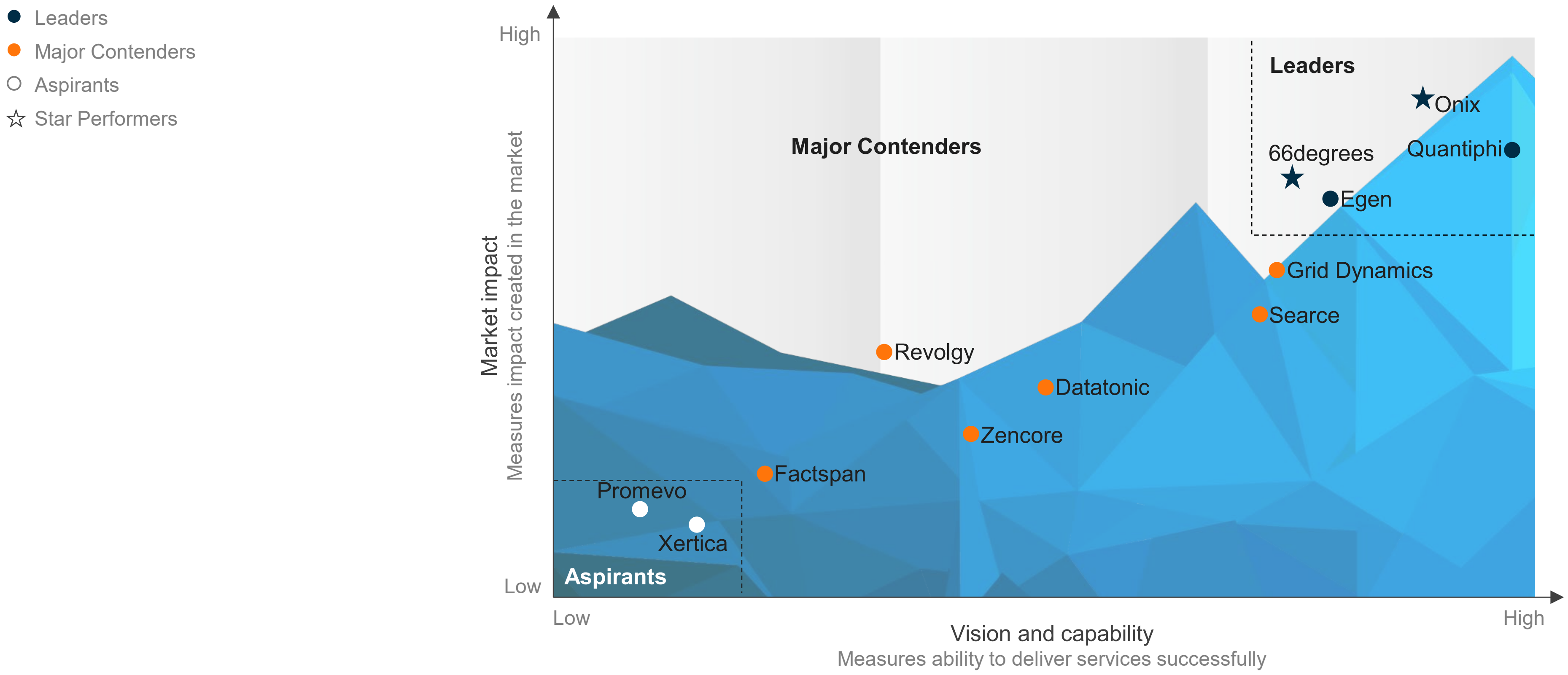
Promevo and Xertica

- Aspirants are developing early momentum across Google Workspace and cloud modernization, focusing on automation-led delivery and niche workload expertise
- Their agility and customer-centric delivery models make them effective partners for midsized clients initiating Google Cloud adoption
- However, limited certifications, IP-led differentiation, and vertical specialization restrict their ability to handle large-scale transformation engagements
- They must invest in repeatable IP frameworks, ecosystem partnerships, and managed services maturity to scale in the enterprise segment

Everest Group PEAK Matrix®

Google Cloud Services Specialists PEAK Matrix® Assessment 2025 | Onix is positioned as a Leader and a Star Performer

Everest Group Google Cloud Services Specialists PEAK Matrix® Assessment 2025[1]



1 Assessments for Datatonic, Revolgy, Searce, and Zencore exclude provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with buyers
Source: Everest Group (2025)

Onix

Everest Group assessment – Leader and Star Performer

Measure of capability: Low High

Market impact				Vision and capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall

Strengths

- Enterprises looking to make Google Cloud the foundation of their digital ecosystem can benefit from Onix's multiple specializations, marketplace presence, and involvement in launch programs for Gemini, Agentspace, and Google Distributed Cloud
- Enterprises adopting agentic AI can leverage Onix's Wingspan platform, which enables AI agents through business knowledge graphs, synthetic data, and domain-specific KPI modeling
- Onix's acquisition of UJET Professional Services has expanded its capabilities in Customer Engagement Solutions (CES) and Contact Center-as-a-Service (CCaaS) delivery, making it a suitable choice for enterprises investing in Google Cloud-enabled contact center transformations
- Enterprises with legacy systems can leverage Onix's proven expertise in modernizing and managing heterogeneous workloads spanning Oracle, VMware, Mainframe, and next-generation stacks
- Some clients acknowledge Onix's technical expertise and strategic partnership with Google Cloud as its key strengths

Limitations

- Enterprises should conduct due diligence before engaging with Onix for vertical-specific use case implementation, as its IP portfolio is mostly skewed toward industry-agnostic solutions
- While Onix offers AI-powered managed services, it lags peers in scale and maturity of its offerings, evidenced by limited market proof points and visibility into tooling integrations for run-phase engagements
- Enterprises with compliance-heavy requirements on Google Cloud should carefully evaluate Onix's limited focus on cloud sovereignty, data residency, and specialized security capabilities
- Those looking for large-scale advisory-led engagements need to evaluate Onix's capabilities, as its consulting mindshare and market presence lags peers
- Some clients have highlighted gaps in project planning and execution rigor to improve delivery predictability and overall project management maturity

Market trends

Google Cloud maintains its competitive edge by accelerating its enterprise relevance by anchoring AI-native modernization on an open, data-intelligent, and secure foundation

Market size and growth[1]

- The global Google Cloud services market is estimated at **US$18 billion in 2024**, with migration/modernization services occupying the highest share
- The market is expected to witness **~16-17% growth**, driven by AI-native adoption and verticalized cloud modernization
- **Analytics and AI workloads** now represent one of the fastest-growing segments, underpinned by **BigQuery**, **Vertex AI**, and **Gemini** integration across enterprise systems

Key drivers for Google Cloud services

AI-led data transformation	Google Cloud unifies AI and data to drive intelligent, adaptive enterprise architectures, with BigQuery, Vertex AI, and Gemini enabling insight-led automation and scalable innovation.
Security-first cloud foundation	Google Cloud's AI-driven, zero-trust security model has become a key enterprise adoption catalyst, enabling predictive resilience and embedded trust across AI and data ecosystems.
Open, hybrid, and sustainable cloud	Google Cloud's leadership in open-source, Kubernetes, and carbon-aware infrastructure enables interoperable, compliant, and eco-efficient operations across environments.
Acceleration through co-innovation ecosystem	Its deep partnerships with service providers and ISVs are unlocking co-engineered IPs, MLOps blueprints, and industry playbooks that scale enterprise adoption.

Opportunities and challenges

Scaling agentic AI outcomes	Enterprises are leveraging Google Cloud's Vertex Agent Builder and Gemini ecosystem to build autonomous, cross-domain AI agents that enhance productivity and accelerate business transformation.
Industry-specific solutions	There is growing enterprise demand for ready-to-deploy, domain-aligned AI solutions, with Google Cloud well positioned to expand its vertical play in BFSI, retail, and healthcare.
Translating innovation into business value	Enterprises continue to face challenges in quantifying RoI from AI investments and embedding governance frameworks to scale gen AI across the organization
Evolving talent and delivery maturity	Google Cloud-focused service providers exhibit strong technical depth but must advance domain alignment, agentic AI expertise, and integrated FinOps capabilities

1 Everest Group estimates

Key buyer considerations

Enterprises seek Google Cloud partners with deep technical depth, gen AI and agentic innovation, commercial flexibility, strong strategic alignment with Google Cloud, and embedded security and compliance capabilities

Key sourcing criteria

High

Priority

Low

Technical depth across Google Cloud technology areas
Demonstrates full-stack proficiency across Google Cloud portfolio, spanning compute, data analytics, gen AI, security, and industry platforms

Capability maturity in gen AI and agentic AI
Delivers value through assets built on Google Cloud products, including industry-specific agents, synthetic data generators, and focused automation frameworks

Commercial and contractual flexibility
Aligns pricing models with Google Cloud constructs such as co-investment funds, support for risk-sharing and innovation, and marketplace-based billing

Strategic alignment with Google Cloud
Maintains a deep partnership with Google Cloud through specializations, partner initiatives, executive alignment, joint GTM, and co-innovation efforts

Security, compliance, and data sovereignty expertise
Implements security architectures through proprietary solutions while integrating compliance blueprints and sovereign cloud frameworks

Summary analysis

When sourcing specialists for Google Cloud services, look for partners with deep technical expertise across Google-native domains. Full-stack fluency is also critical to deliver seamless transformation across infrastructure, data, AI, and application layers.

Given Google Cloud's aggressive push into generative and agentic AI, buyers should assess partners' IP maturity. Partner proximity through specializations and launch involvement also showcases partners' strategic value in the Google Cloud ecosystem.

Commercial flexibility also remains a key differentiator, especially for large enterprises with evolving priorities. Partners that can align with Google's co-investment structures, enable Marketplace transactions, and provide modular, outcome-based SLAs will also offer greater adaptability over long-term engagements.

Key takeaways for buyers

Prioritize the selection of Google Cloud–specialized partners that demonstrate AI-native engineering depth, data-first delivery models, and automation-led managed services, while ensuring alignment with FinOps, sovereignty, and security-by-design principles critical to regulated, cost-sensitive sectors.

Shifts in provider capabilities

Buyers now prioritize partners with deep Google-native maturity across Vertex AI, data mesh, and Kubernetes-based modernization, backed by embedded cost governance, sustainability, and security-first engineering. The focus is shifting from migrations to AI-augmented modernization, where automation and responsible AI guardrails are integral to delivery.

Differentiation across provider types

Enterprises are building modular Google Cloud ecosystems, choosing between specialists for agility and gen AI expertise versus regional mid-tier partners for managed-service scale and compliance depth. Co-innovation potential and fit-for-purpose workload expertise are becoming stronger selection levers than provider size.

Key innovations

Buyers are seeking partners with reusable Google Cloud IP, automation-first delivery, and outcome-based frameworks that reduce TCO and accelerate value realization. Leading specialists are blending FinOps and gen AI accelerators into managed operations to create business impact for enterprises.

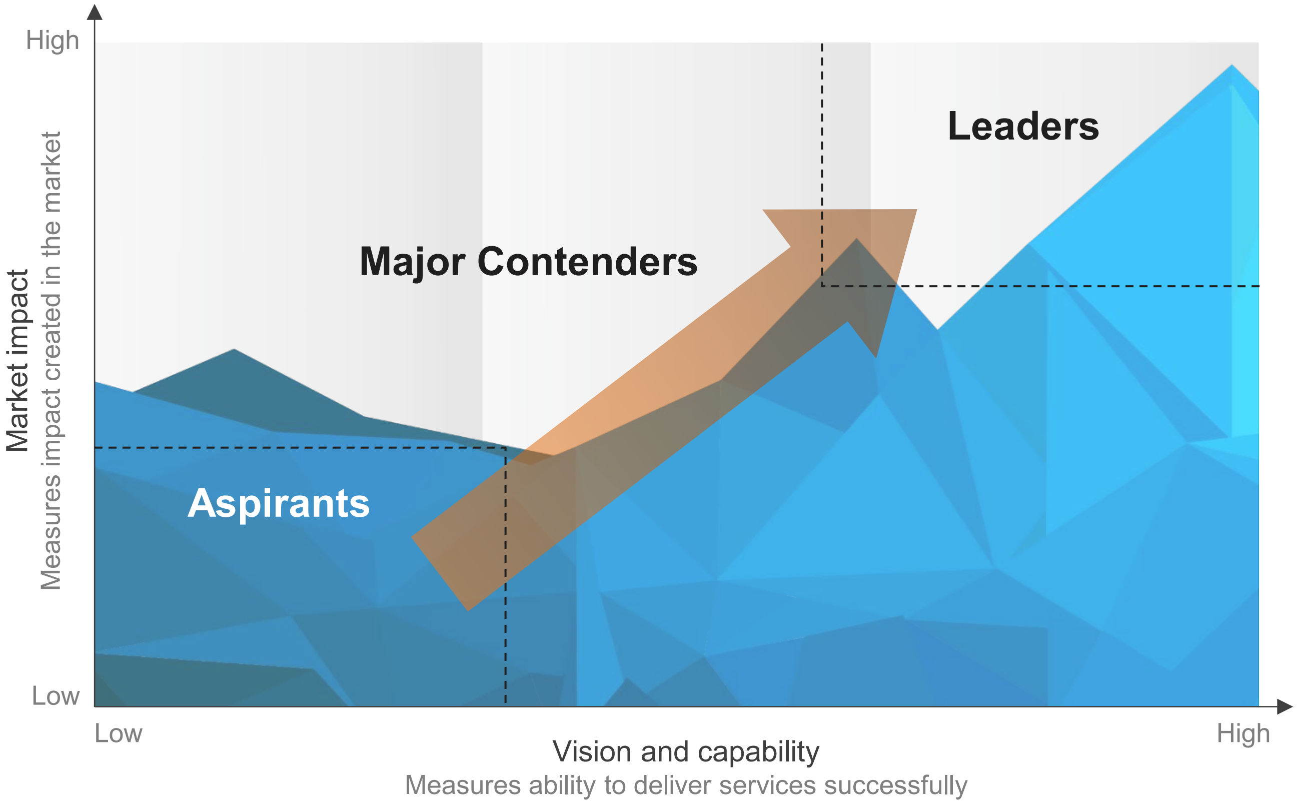
Appendix

PEAK Matrix® framework

FAQs

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



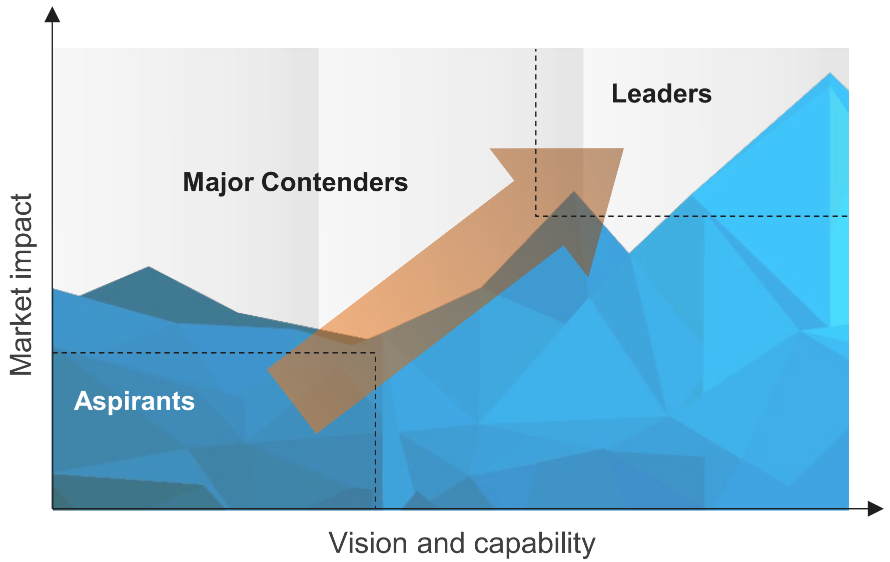
Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, YoY growth, and deal value/volume

Portfolio mix
Diversity of client/revenue base across industries and type of engagements

Value delivered
Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy
Vision for the client and itself; future roadmap and strategy

Scope of services offered
Depth and breadth of services portfolio across service subsegments/processes

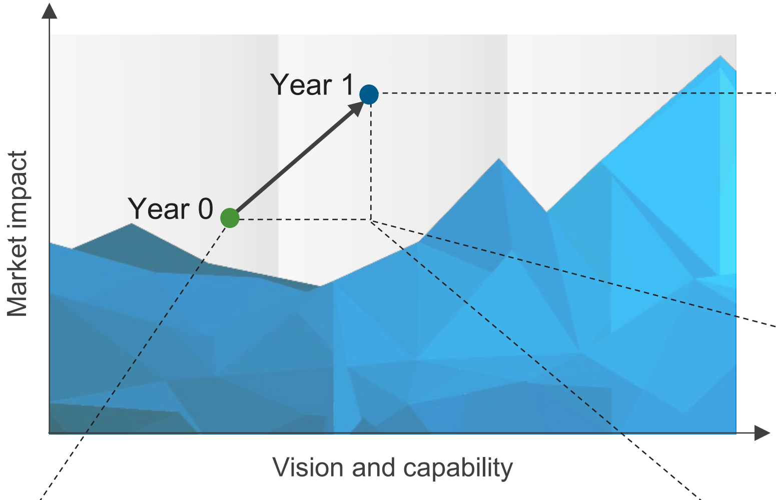
Innovation and investments
Innovation and investment in the enabling areas, for example, technology IP, industry/domain knowledge, innovative commercial constructs, alliances, and M&A

Delivery footprint
Delivery footprint and global sourcing mix

Everest Group confers the Star Performer title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



In order to assess advances on **market impact**, we evaluate each provider's performance across a number of parameters including:

- Yearly ACV/YoY revenue growth
- # of new contract signings and extensions
- Value of new contract signings
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances in vision and capability, we evaluate each provider's performance across a number of parameters including:

- Innovation
- Increase in scope of services offered
- Expansion of delivery footprint
- Technology-/Domain-specific investments

We identify the providers whose improvement ranks in the top quartile and award the Star Performer rating to those providers with:

- The maximum number of top-quartile performance improvements across all of the above parameters

AND

- At least one area of top-quartile improvement performance in both market success and capability advancement

The Star Performer title relates to YoY performance for a given provider and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being in included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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