

Public Cloud - Solutions and Services

Consulting and Transformation Services
for Large Accounts

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:



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A year improving the maturity of the French market

Compared with last year, enterprises in France are taking more time to assess and engage cloud partners. Companies show a better understanding of the benefits the cloud and the impact it has on business competitiveness. Enterprises, therefore, are cautious, making the best choice, indicating market maturity after the cloud rush observed in 2020 and 2021.

The French government's strategy defined in 2021 for cloud de confiance (trusted cloud) and cloud au centre (cloud at the center) is in effect, and the Agence Nationale de la Sécurité des Systèmes d'Information (ANSSI) has issued two SecNumCloud visas. These certificates

ensure data residency in Europe and the effectiveness of data loss prevention tools. Although discussions on true data sovereignty are underway and have been evolving, no comprehensive solution to comply with data residency laws for companies that operate outside the eurozone is currently available.

Enterprises continue with their cloud functions despite the presence of regulations. Health Data Hub (HDH) is a public interest group (GIP) created in 2019 to support the Système National des Données de Santé (National Health Data System or SNDS). HDH centralizes health data generated in France, on Microsoft Azure, which ensures that data remains within the country, is encrypted and protected with advanced data loss prevention tools. However, Microsoft is bound by the U.S. Cloud Act, which implies that the U.S. government can mandate that Microsoft shut down a client

Stronger focus on multi-cloud expenditures



access to Azure, which would prevent the French government from accessing citizens' health data.

From regulators' point of view, HDH and other companies in the same situation should simply move their data to a SecNumCloud-certified data center. However, enterprises need the advanced cloud tools the American hyperscalers offer to manipulate the data sets – to extract, convert, change, query and organize data with AI technologies – added by data access control and data loss prevention tools. These advanced, cloud-native tools are not offered by most competitors. The cost to develop, test and certify cloud-native technologies can be enormous, thus accessible to hyperscalers but not the local service providers; the financial strength of AWS, Microsoft or Google cannot be compared with that of local, France-based organizations. Market leaders are forming partnerships

to overcome the sovereignty challenge — T-Systems and Google Cloud, OVHcloud and Google Anthos, Thales and Google, and Bleu (the Capgemini, Orange and Microsoft partnership). ISG expects these announcements to show results in 2024.

The job market in France has also been impacted by the growth in cloud demand. For enterprise clients, it is a challenge to meet the demand for qualified professionals by providing attractive salaries. Most service providers surveyed describe hiring and retaining talent as a challenge. They are partnering with academia and offering training and certification programs to develop new talent. For example, AWS has trained more than 100,000 people in France since 2017. ISG global research shows that the number of cloud-certified professionals is doubling every year.

Trends in the Consulting And Transformation Services quadrants

indicate that an increasing number of enterprises are adopting cloud-native technologies to improve business value. ISG notes a relatively small number of companies are adopting a lift-and-shift approach, with the majority of migrations assessing application modernization options. Clients expect providers to develop and manage a robust business case that includes infrastructure as code (IaC), serverless computing, APIs, microservices, analytics and broad use of automation. At the same time, clients expect providers to help in developing the required culture and skills, ensuring compliance and security at scale, and pushing new governance models to handle the consequent complexity.

In the **large accounts market**, sophisticated cloud readiness assessments are giving way to automated tools, including tools for data extraction from legacy databases to load into cloud-native, as-a-service databases. These automation tools complement the migration frameworks offered by hyperscalers to enable large workloads with hundreds of servers and many terabytes of data to migrate in short cycles, thereby reducing the impact on normal business operations.

A series of mergers and acquisitions in the last two years have reduced the number of certified partners that focus on the **midmarket** in France. Many local service providers have not qualified for inclusion in this study. However, the providers that have a clear focus on the midmarket have reported record growth. A typical midmarket client understands that liaising with a certified service provider is the best



way to access the support of top experts for cloud services, including automation, data analytics and AI.

Trends in the Managed Public Cloud Services quadrant include a stronger focus on controlling multi-cloud expenditures. ISG global research shows that one third of enterprises have one cloud, another one third have two clouds and the remaining enterprises use three or more clouds. A similar trend is visible in France. Clients can use one cloud for core applications, another for collaboration and other clouds with copies to ensure data residency, sovereignty, compliance and disaster recovery.

Large accounts demand governance tools to manage access rights, spending rights, cost accounting and budget spending. In this market segment, service providers have been improving their AIOps, offering self-service catalogs with automated workflows that verify approval,

authority, access and log users' activity. Advanced tools ensure cloud asset configurations comply with company policies. FinOps tools integrate the usage on all cloud platforms to consolidate spending and reporting. Advanced FinOps include AI algorithms that can predict spending to generate alerts or prevent overspending, thus keeping a budget compliant to enterprise rules. The level of sophistication that AIOps and FinOps tools have achieved is notable. However, these advanced functions are not available on commercial tools. Leading service providers have proprietary tools to complement and orchestrate commercial tools, and clients should assess their providers accordingly.

Managed service providers addressing the **midmarket** offer AIOps and FinOps functionalities with less sophistication around governance and compliance because a typical midmarket client is

primarily focused on costs and spending. For this market segment, advanced service providers use AI algorithms that monitor usage patterns to offer insights for optimization. The leading providers offer cloud architecture advice to explore consolidation and upgrades that promote performance and cost savings, which, in many cases, means the extended use of serverless IaC, data lakes and other cloud services that eliminate or reduce server utilization hours and the database size.

The Hyperscale Infrastructure and Platform Services quadrant assesses the 12 hyperscalers that have operations in France — which is two more than last year. The increasing importance of cloud sovereignty is attracting new players. ISG expects to find more new players next year. However, the market in France is dominated by American hyperscalers because of the rich portfolios they offer. For the reason, ISG expects

more partnerships to be established in the future to better balance client requirements and government concerns.

This market is characterized by players competing for new clients and new workloads. ISG has found only a few cases of clients migrating from one hyperscaler to another. The hyperscalers have adapted their offerings to the multi-cloud reality.

The **SAP HANA Infrastructure Services** quadrant shows contended growth in France. However, for new clients willing to run SAP products, cloud is the only option. SAP no longer offers perpetual licenses for on-premises deployments or for existing clients; it offers attractive deals to push cloud adoption.



Executive Summary

RISE with SAP, or simply SAP RISE, is an SAP program to accelerate clients' migration to the cloud. It bundles pay-per-user SAP S/4HANA licenses and cloud infrastructure that looks like a SaaS model. Clients can choose their preferred cloud, where SAP acts as a managed service provider.

Leaders in this market offer automation to assess, plan and migrate SAP to the cloud, including legacy ECC systems, data warehouses, documents and files. It is not a simple process, and automation can reduce migration cost and time.

Providers offer cloud architecture advice to optimize cloud use.




Provider Positioning

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	Consulting and Transformation Services for Large Accounts	Consulting and Transformation Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
3DS OUTSCALE	Not In	Not In	Not In	Not In	Contender	Not In
Accenture	Leader	Not In	Leader	Not In	Not In	Not In
Alibaba	Not In	Not In	Not In	Not In	Contender	Not In
Atos	Leader	Not In	Leader	Not In	Not In	Not In
AWS	Not In	Not In	Not In	Not In	Leader	Leader
Axians	Contender	Not In	Contender	Not In	Not In	Not In
Bechtel	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
Be-Cloud	Not In	Contender	Not In	Contender	Not In	Not In
BSO	Not In	Contender	Not In	Product Challenger	Not In	Not In
Capgemini	Leader	Not In	Leader	Not In	Not In	Not In




 Provider Positioning

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	Consulting and Transformation Services for Large Accounts	Consulting and Transformation Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
CGI	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Claranet	Not In	Leader	Not In	Leader	Not In	Not In
Cognizant	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Computacenter	Not In	Product Challenger	Not In	Not In	Not In	Not In
Corexpert	Not In	Contender	Not In	Contender	Not In	Not In
Crayon	Not In	Contender	Not In	Contender	Not In	Not In
Devoteam	Not In	Leader	Not In	Leader	Not In	Not In
DoiT	Not In	Contender	Not In	Contender	Not In	Not In
DXC Technology	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Ecritel	Not In	Contender	Not In	Contender	Not In	Not In




 Provider Positioning

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	Consulting and Transformation Services for Large Accounts	Consulting and Transformation Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Fujitsu	Contender	Not In	Contender	Not In	Not In	Not In
GlobalLogic	Contender	Not In	Not In	Not In	Not In	Not In
Google	Not In	Not In	Not In	Not In	Market Challenger	Market Challenger
HCLTech	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
IBM	Leader	Not In	Not In	Not In	Product Challenger	Product Challenger
Infosys	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
IONOS	Not In	Not In	Not In	Not In	Contender	Not In
Kyndryl	Not In	Not In	Leader	Not In	Not In	Not In
LTI	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Microsoft	Not In	Not In	Not In	Not In	Leader	Leader



 Provider Positioning

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	Consulting and Transformation Services for Large Accounts	Consulting and Transformation Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
NTT Ltd.	Contender	Not In	Contender	Not In	Not In	Not In
Open Telekom Cloud	Not In	Not In	Not In	Not In	Contender	Not In
Oracle	Not In	Not In	Not In	Not In	Market Challenger	Not In
Orange Business Services	Leader	Leader	Leader	Leader	Product Challenger	Contender
OVHcloud	Not In	Not In	Not In	Not In	Rising Star ★	Contender
oXya	Not In	Leader	Not In	Leader	Not In	Contender
PASàPAS	Not In	Market Challenger	Not In	Contender	Not In	Not In
Reply	Not In	Product Challenger	Not In	Contender	Not In	Not In
SAP	Not In	Not In	Not In	Not In	Not In	Product Challenger
ScaleSquad	Not In	Leader	Not In	Leader	Not In	Not In



Provider Positioning

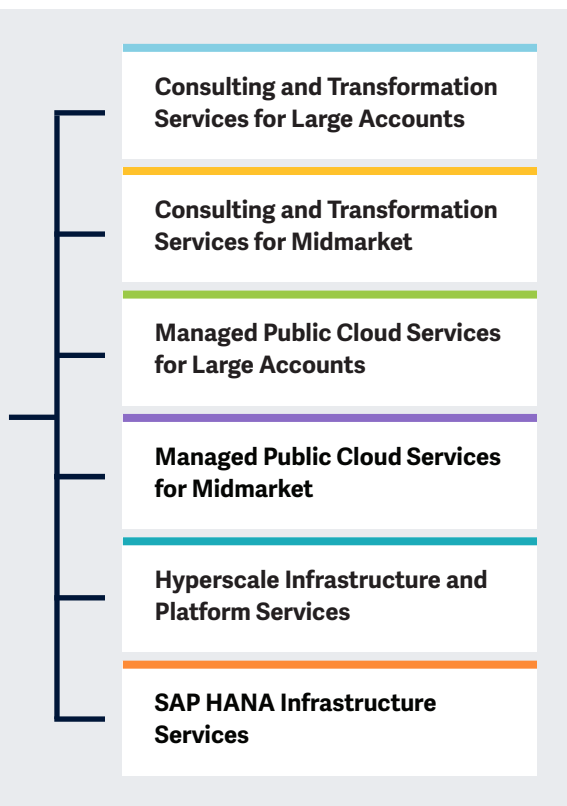
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	Consulting and Transformation Services for Large Accounts	Consulting and Transformation Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Scaleway	Not In	Not In	Not In	Not In	Product Challenger	Not In
SCC	Not In	Contender	Not In	Product Challenger	Not In	Not In
SoftwareONE	Not In	Market Challenger	Not In	Contender	Not In	Not In
Sopra Steria	Leader	Leader	Leader	Leader	Not In	Not In
Stack Labs	Not In	Contender	Not In	Not In	Not In	Not In
TCS	Rising Star ★	Not In	Leader	Not In	Not In	Not In
Tech Mahindra	Contender	Not In	Contender	Not In	Not In	Not In
T-Systems	Product Challenger	Product Challenger	Not In	Product Challenger	Not In	Contender
Unisys	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Wipro	Leader	Not In	Leader	Not In	Not In	Not In



This study focuses on what ISG perceives as most critical in 2022 for **Public Cloud – Solutions & Services**

Simplified Illustration Source: ISG 2022



Definition

With the pandemic transition to the endemic stage, enterprises are rapidly increasing their investments in digital transformation engagements, which is leading to an exponential rise in public cloud adoption. Other key reasons for this move are a higher emphasis on cybersecurity, a greater push towards IT cost optimization and operational efficiency, and increased deployment of automation tools for data management. The growing maturity of public cloud infrastructure providers has had a major impact on both enterprises and IT service providers, with both witnessing a significant shift in sourcing services, from physical hardware to digital applications and platforms.

For enterprises, this has also impacted business models that require digital initiatives and aim to address governance,

risk and compliance norms. Given the widespread adoption of the as-a-service model, enterprises should continuously evaluate cloud service providers on a global level mainly due to growing security concerns and the dynamic nature of the business landscape. They continue to seek providers that can act as strategic partners in carrying out cloud transformation engagements on major hyperscalers – AWS, Microsoft Azure and Google Cloud Platform (GCP). These providers will continue to manage workloads on an ongoing basis and help enterprises control, optimize and manage cloud expenses through frameworks such as FinOps.

ISG reports a strong demand for digital transformation engagements and cloud-based XaaS solutions which, in turn, is driving global contracts for cloud products and services, including infrastructure-as-a-service (IaaS), software-as-a-service



(SaaS) and platform-as-a-service (PaaS). According to the 1Q 2022 ISG Index™ figures, the global market has grown 31 percent in combined market annual contract value (ACV) to reach its current value of \$24 billion year over year, while the XaaS ACV has increased by 43 percent to reach \$15.6 billion in the same period. The IaaS spending grew by more than 50 percent to reach \$11.7 billion, while the SaaS market grew by 22 percent to reach \$3.9 billion.

The ISG Provider Lens™ study offers IT decision makers:

- A differentiated positioning of providers based on competitive strengths and portfolio attractiveness
- Focus on different markets, including the U.S., the U.S. public sector, Germany, Switzerland, the U.K., Nordics, Brazil, Australia, France and global geographies

ISG studies serve 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.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following six quadrants: Consulting and Transformation Services for Large Accounts, Consulting and Transformation Services for Midmarket, Managed Public Cloud Services for Large Accounts, Managed Public Cloud Services for Midmarket, Hyperscale Infrastructure and Platform Services, and SAP HANA Infrastructure Services.

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

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on regional market

Our study serves as the basis for important decision-making in terms of 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 service providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT 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 IT 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 US\$20 million and US\$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 US\$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 Challenger, 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.

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.

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.

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.





Consulting and Transformation Services for Large Accounts

Who Should Read This

This report is relevant to large enterprises in France that are evaluating consulting and transformation service providers in the public cloud environment. In this quadrant report, ISG defines the current market positioning of service providers in France and shows how they address the key challenges faced by large enterprises with their public cloud model.

Enterprises in France are still in the phase of complying with the defined data regulations required to be incorporated in the cloud transformation journey. ISG observes that the demand for a lift-and-shift approach has reduced significantly, with most migrations now assessing application modernization options. Enterprises in the region are now emphasizing provider's capabilities such as effective workload assessment, change management and a defined pool of cloud-certified workers.

Companies expect providers to develop and manage a robust business case that includes infrastructure-as-code (IaC), serverless computing, APIs, microservices and analytics, along with broad use of automation.

Enterprises are seeking providers that can help in developing the required culture and skills for regions like France and ensure security at scale while pushing new governance models to handle complexity. The use of automation tools complements the migration frameworks offered by hyperscalers. It will enable large workloads with hundreds of servers and terabytes of data to migrate in shorter cycles, thus reducing the impact on normal business operations.



IT leaders should read this report to better understand the relative strengths and weaknesses of consulting and transformation service providers, as well as to help them lead the drive toward digital transformation in their enterprises.



Software development and technology leaders should read this report to understand the positioning of consulting and transformation service providers, learn how those providers' offerings can impact an enterprise's ongoing transformation initiatives and discover the business benefits that can be achieved.



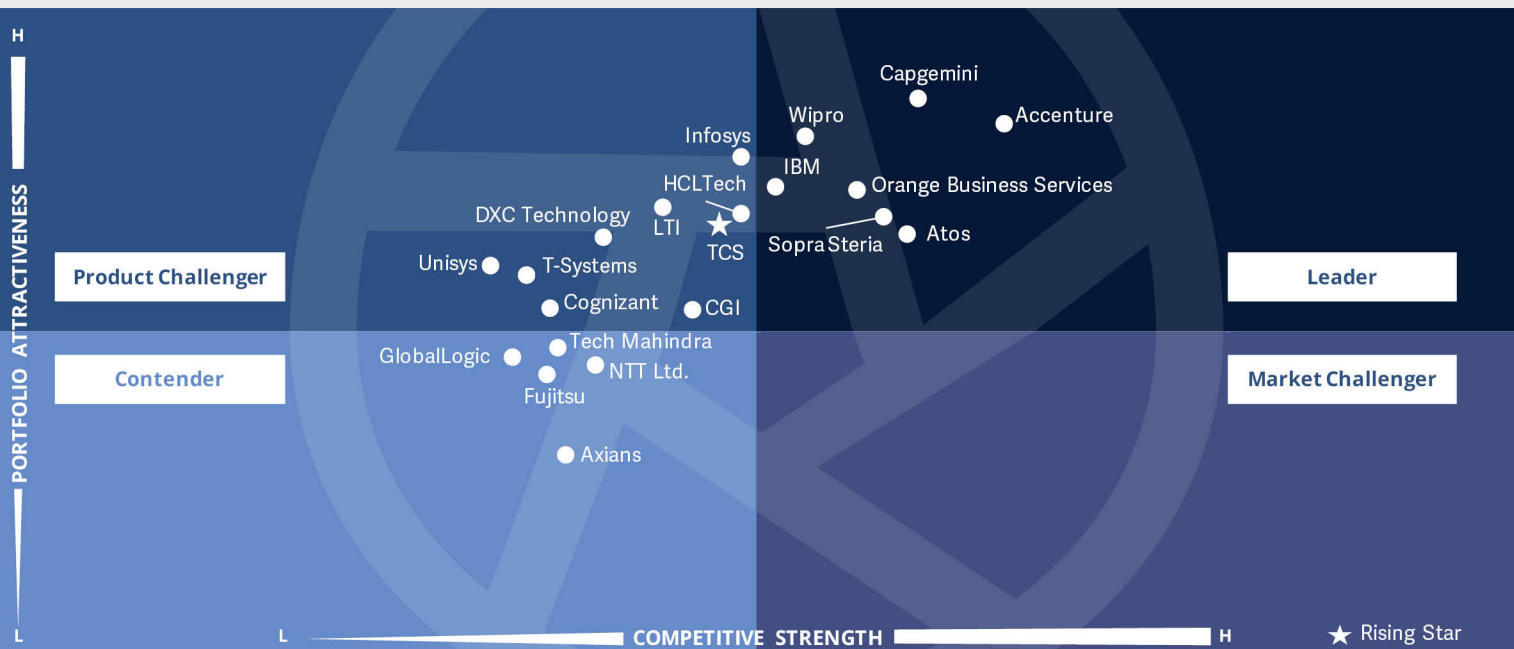
Sourcing, procurement and vendor management professionals should read this report to develop a better sense of the current landscape of consulting and transformation service providers in France.



ISG Provider Lens™
 Public Cloud – Solutions and Services
 Consulting and Transformation Services for Large Accounts

Source: ISG RESEARCH

France 2022



This quadrant assesses the providers of consulting services to **migrate** applications to public clouds and transform large account infrastructures to modern digital platforms.

Pedro L. Bicudo Maschio



Consulting and Transformation Services for Large Accounts

Definition

This quadrant assesses service providers or service integrators that offer consulting and transformation services for enterprise public cloud engagements in the context of their digital transformation. Participating service providers have partnerships with public cloud infrastructure providers to offer ideation for multi-cloud programs and industry cloud solutions and manage customer-specific complexities in the adoption and deployment of public cloud solutions. These providers have highly skilled developers and software architects that leverage design thinking, scrum initiatives and short work cycles to meet the growing customer demands. This quadrant evaluates providers that help enterprises modernize, optimize and transform their business operations to increase efficiency, agility and security. Hyperscale cloud

partners leverage platform-specific best practices to maximize and optimize the value of existing and new investments.

Provider services typically include the following:

- **Consulting services:** Consultants design a business case for multi-cloud environments, and they assess workloads for migration. They also build a transformation roadmap for addressing risk, security and compliance issues and advise on migrating applications from the existing environment to a public cloud.
- **Transformation services:** Cloud experts are involved in designing and building multi-cloud architectures or environment. They also offer support for migrating and integrating applications to harness cloud computing features and benefits.
- **Governance, risk and compliance services:** Cloud experts design frameworks, policies, processes and functions to ensure that enterprise cloud workloads are run in a secure and compliant environment regardless of location. As governance, risk and compliance have become a mainstream requirement from a CXO perspective, the industry expects these to be an integral part of transformation engagements.



Eligibility Criteria

1. **Methods and frameworks** to analyze a client's IT landscape and help them avoid additional technical debts and **realize value** in their IT spending
2. Experience in **planning** and **implementation** of Multicloud services for major industry verticals
3. **Application migration** experience (templates, automation engines and many other techniques) in conjunction with cloud-native application development for **greenfield** and **brownfield** workloads
4. **Hyperscale-related partner** program certifications
5. **Competence** in at least two hyperscalers (preferred providers – AWS, Azure and GCP)
6. Offers **API libraries** for application and service integration in public cloud
7. Ability to drive **governance, risk and compliance** for large transformation programs
8. Help clients with their **carbon neutral strategies** and help them understand benefits of a green strategy, by leveraging proprietary platforms
9. Migration through **cloud-native** application development for brownfield workloads



Consulting and Transformation Services for Large Accounts

Observations

The consulting and transformation services market shows acceleration in 2022, with an increasing number of companies migrating their workloads to the cloud.

In 2022, ISG sees more grounded discussions around GDPR, data sovereignty, the Gaia-X project and ANSSI regulations, which provided more clarity for France-based organizations assessing their options to design sustainable cloud platforms. Enterprises no longer argue about cloud value and now focus on the correct use of cloud infrastructure and services.

Environment, social and governance (ESG) compliance is included in the design of sustainable cloud. Hyperscalers have committed to reduce and compensate

for their carbon footprint, and clients migrating to cloud can accelerate their ESG programs.

The leading providers of consulting and transformation services can help clients with best practices and tools to manage ESG programs, including tools to monitor carbon footprint, measure ESG and report business achievement toward ESG targets. Clients should ask their service providers about their ESG commitment and practical outcomes.

From the 50 companies assessed for this study, 21 have qualified for this quadrant, with seven being Leaders and one a Rising Star.

accenture

Accenture has a sizeable organization in France. Its global acquisitions, including Linkbynet in France, have been contributing to supplement the human capital that is necessary to support cloud growth. It offers consulting with local experts that are backed by a large, global consulting organization.

Atos

Atos has strong partnerships with Google and Microsoft. To take its AWS partnership to the same level, it acquired several companies, including Edifixio in France and Cloudreach in the U.K., which upgraded its certification levels and added robust cloud transformation expertise to its capabilities.

Capgemini

Capgemini is one of the largest IT service organizations in France, with years of experience in offering consulting services in the country. It has top partnerships and uses robust automation to provide clients with effective cloud migrations that are designed to integrate with a robust managed services platform.

IBM

IBM has a robust consulting organization, IBM Consulting, with many years of experience. It offers design and ideation workshops for transformation, using innovation and by reinventing business processes with technologies, including AI, analytics and cognitive computing.



Consulting and Transformation Services for Large Accounts

Orange Business Services

Orange Business Services leverages its significant footprint in France to offer clients with access to leading technologies. It offers a pragmatic approach to cloud transformations, with strong capabilities around analytics, 5G, IoT and cybersecurity.

Sopra Steria

Sopra Steria has a wide presence in France, which provides it with the required client proximity. It has improved its partnerships with more certifications and through the addition of application modernization expertise in sync with market trends. It is well prepared to advise clients on data sovereignty.



Wipro has been investing to enhance its consulting expertise globally and is focused on business expansion in Europe. It offers comprehensive frameworks and automation tools to reduce complexity and improve business outcomes, enabling it to anticipate clients' results.



TCS is a Rising Star. Its renewed focus on public cloud and on helping hyperscalers grow their large accounts' client pool position it for accelerated growth in France. Clients benefit from its frameworks and many years of experience with large accounts to use best practices and deploy secure cloud solutions.





“Orange Business Services doubled its cloud skills in four years to offer clients great experiences.”

Pedro L. Bicudo Maschio

Orange Business Services

Overview

Orange Business Services is a division of the Orange Group. The company offers networking, cybersecurity, customer experience, collaboration and cloud services. In 2022, it consolidated the acquired companies, Basefarm, Login Consultants and The unbelievable Machine Company (*um) into it, totaling 2,600 cloud experts. Orange Business Services is headquartered in Paris and serves more than 3,000 multinational enterprises. In 2021, it reported €7.8 billion in revenue, with 43 percent in IT and IS.

Strengths

Business-outcome offering: Orange Business Services adds innovation and technology to elevate clients’ competitiveness. Its edge, 5G, cyber defense and data expertise provide differentiation, enabling it to build on clients’ trust to co-develop unique cloud solutions.

Robust framework: Orange Business Services’ Go2Cloud offers a framework to support end-to-end cloud journeys. The company has more than 1,000 cloud certifications on AWS, Azure and Google. By using hyperscalers’ best practices and the Go2Cloud framework,

its cloud advisory services experienced a 30 percent growth in 2021.

Contribution to clients’ maturity:

Orange Business Services helps clients mature their cloud practices. It can show many cases where it helped traditional businesses gradually migrate to cloud. It offers cybersecurity and sovereignty services with advisory expertise for secure and compliant cloud adoption. It also guides clients to develop their culture and skills to exploit cloud business value.

Caution

Orange Business Services has improved its consulting and advisory capacity in comparison to last year. However, it has not achieved a top level in business consulting. The company should continue investing in building on its consulting capacity to elevate its portfolio attractiveness.





Appendix

The ISG Provider Lens™ 2022 – Public Cloud - Solutions & Services research study analyzes the relevant software vendors/service providers in the French 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 report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of September 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

1. Definition of Public Cloud - Solutions & Services 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



Pedro L. Bicudo Maschio
Lead Analyst

Distinguished analyst and author, Pedro Maschio brings extensive experience in the research of the SEMEA (Southern Europe Middle East and Africa) and Latin America service markets. With more than 30 years of experience in sourcing, he has developed vendor assessments plus contract restructuring, services scope and IT benchmarking programs for diverse vertical markets in the Americas and APAC.

Before joining ISG, Pedro was a partner of TGT Consult and managing vice president at Gartner Inc., responsible for the consulting business in APAC and Latin America.

Enterprise Context and Overview Analyst



Chandra Shekhar Sharma
Research Specialist

Chandra Shekhar Sharma is a Research Specialist at ISG and is responsible for supporting ISG Provider Lens™ studies on Private Hybrid Cloud and Public Cloud Data Center Solution and Services. He supports the lead analysts of multiple regions in the research process and authors the global summary report. Shekhar is responsible for delivering enterprise' perspective for IPL and collaborates with analyst, advisors, and enterprise clients on various ad-hoc research requests. He comes with over eight years of research and consulting experience into IT

industry. Prior to this role, he has been associated with several custom market and procurement research firms, in which he has delivered actionable insights and recommendations around market sizing and forecasting, industry level trends and drivers, procurement best practices, sourcing models and strategy, competitive benchmarking, market share analysis and vendor landscape for industry verticals such as IT hardware, IT services, transportation and warehousing.





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 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.

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