ISG Provider Lens™

Public Cloud - Solutions and Services

Consulting and Transformation Services for Midmarket

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

orange™ Business Services

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Table of Contents

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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.

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

Page 1 of 5

	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
Bechtle	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

Page 2 of 5

	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

Page 3 of 5

	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

Page 4 of 5

	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

Page 5 of 5

	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**

- **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**

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 though 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.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Consulting and Transformation Services for Midmarket

Who Should Read This

This quadrant is relevant to mid-sized 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 mid-sized enterprises with their public cloud models. These providers are adept at providing cloud migration services to the clients, enabling them to focus on other tasks.

After the pandemic, the midmarket enterprises are seeking service providers that can effectively migrate workloads to the public cloud with a strong focus on application modernization. Enterprises are dealing with challenges related to data sovereignty regulations to adopt cloud services, and incorporation of the best cloud decisions and deployments usually takes time.

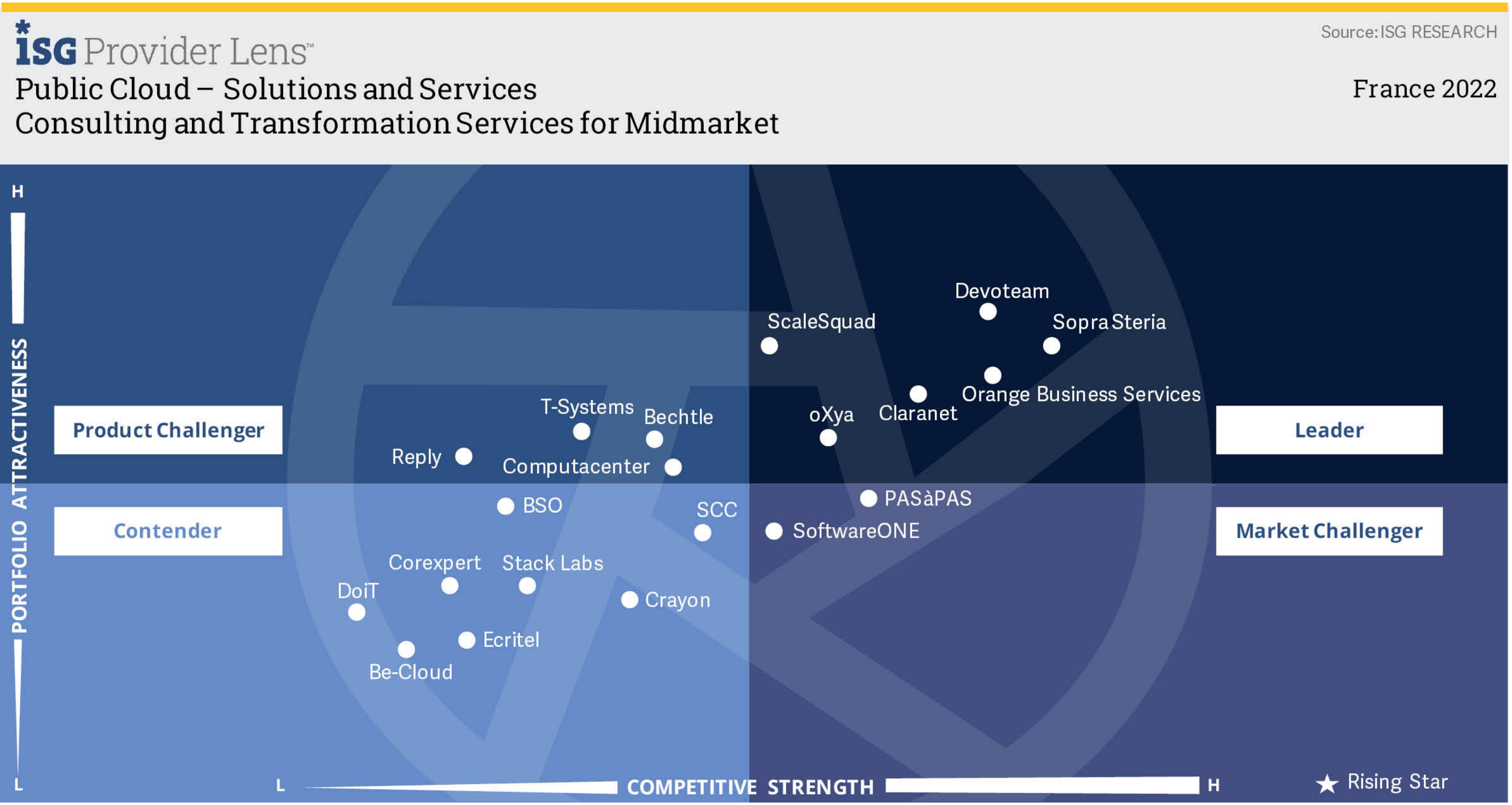
Mid-sized enterprises are gaining acumen by working with providers that offer data-based workload assessments, transformation roadmaps, advisory services on workload migration; while adhering to the latest security requirements and delivering optimized cloud governance. As the midmarket cloud market grows more competitive, consulting and transformation service providers are investing more in training and increasing the number of certified professionals.

Service providers are focusing on delivering robust frameworks that include best practices and guidelines certified by hyperscalers to enhance the adoption of cloud infrastructure services.

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.



This quadrant assesses service providers of consulting services to **migrate applications to public clouds**, transforming **midmarket client** infrastructures to modern digital platforms.

Pedro L. Bicudo Maschio

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 public cloud solutions adoption and deployment. 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 environments. 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 multi-cloud 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

Observations

With hyperscalers investing in partnerships, local service providers are attracted to the growth potential and support they can get from these hyperscalers. The midmarket offers the best cloud growth opportunities because of the number of enterprises it includes, and the great business impact that innovation with cloud-native technologies can bring to this client segment.

As multi-cloud becomes pervasive, an increasing number of clients are asking about which cloud is the best. However, typical clients have their decision made when inviting a service provider to execute their workload migrations. In general, clients consider IaaS as a commodity, leveling all hyperscalers. The best cloud decision is aligned more with each cloud technology portfolio rather than price and performance. A pre-existing relationship with a hyperscaler also has a great influence on decision-making.

Leading service providers use robust frameworks that include best practices and guidelines certified by hyperscalers. With vast experience, cloud migrations are low risk and can be executed within a short time.

From the 50 companies assessed for this study, 20 have qualified for this quadrant, with six being Leaders.

claranet

Claranet is one of the pioneers in offering cloud services in France. It leverages a global service platform and top partnerships to offer clients the best choices for cloud migration. It uses robust frameworks and tools, covering both security and compliance.

Devoteam

Devoteam reinvented itself to deliver digital transformations. After several acquisitions, it expanded its partnerships and invested in certifications. It focuses on specialized services for AWS, Azure, Google, Salesforce and ServiceNow, where it uses these cloud platforms to deliver business solutions.

Orange Business Services

Orange Business Services offers broad market coverage, reaching midmarket clients across France. It partners with AWS, Azure and Google and uses best practices to accelerate cloud migrations. It adds networking, analytics and security capabilities to improve its service efficiency.

oXya

oXya, a Hitachi Group company, has a long tradition in offering SAP hosting in France. In recent years, it has partnered with AWS, Azure and Google to extend its service capabilities. With many migrations completed, it has the experience to migrate SAP to cloud.

ScaleSquad

ScaleSquad is well funded by its parent company, NEURONES. It is nimble to respond to midmarket clients' needs and, at the same, offers the experience and tools of a large service provider. It has a detailed assessment framework and a robust migration toolset.

Sopra Steria

Sopra Steria leverages its sizeable organization to deliver end-to-end IT services. It can meet complex demands and advise clients on regulations, security and sovereignty, enabling them to understand every option in detail to size risks and rewards before designing hybrid solutions.

Orange Business Services

Leader

"Orange Business Services accelerates cloud transformation with advanced analytics and security."

Pedro L. Bicudo Maschio

Overview

Orange Business Services is a division of the Orange Group. The company offers networking, cybersecurity, customer experience, collaboration and cloud services.

Orange Business Services is headquartered in Paris and serves more than 2 million SME clients. It is present across France, ensuring customer proximity. In 2021, the company generated €7.8 billion in with 43 percent in IT and IS.

Strengths

Accelerated cloud transformation: Orange Business Services helps clients improve their cloud maturity. It offers many use cases to accelerate cloud migrations with Go2Cloud, a framework to support end-to-end cloud journeys. For clients subject to strict regulations, the company offers compliance assessments to ensure data sovereignty and GDPR compliance and deliver cyber defense solutions.

Vast partner ecosystem: Orange Business Services has more than 1,000 cloud certifications on AWS, Azure and Google, along with a robust network to offer low-latency connectivity for multi-cloud and hybrid architectures. The company partners with many vendors to support clients with all their infrastructure and security needs.

Complete cloud offering: Orange Business Services offers cloud-native delivery models, bringing expertise to transform workloads and introduce data analytics, IoT and edge computing. It helps clients automate DevSecOps and adopt site reliability engineering (SRE) practices.

Caution

Orange Business Services offers a vast portfolio without differentiating large accounts and midmarket accounts. The company should develop dedicated teams to support midmarket clients.

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

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.

About Our Company & Research

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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