ISG Provider Lens™

Public Cloud – Services & Solutions

Consulting and Transformation Services for Large Accounts

France 2021

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

orange™ Business Services

December 2021

About this Report

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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 July 2021, 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.

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EXECUTIVE SUMMARY

Public cloud use is accelerating in France. In 2021, the French Government declared its support to cloud adoption to allow French companies and administrations to benefit from the best cloud services. The government strategy defines three pillars to further this cause – cloud de confiance (trusted cloud), cloud au centre (cloud at the center) and Politique Industrialle (incentives for high-value-added projects, including AI, analytics and collaboration).

The announcement is a part of the France Relance recovery plan, compelling business executives and governments to prioritize cloud adoption. The government push on cloud has, correspondingly, drawn attention to concerns around data privacy, data sovereignty, cyberattacks and extraterritorial legislation, including access to citizen data and company secrets. The intent is to protect sensitive data from the U.S. Cloud Act (it can mandate access to data hosted by any U.S-based company), and espionage or sabotage by other countries and terrorist groups.

The global IT service providers tend to oversimplify these concerns by offering General Data Protection Regulation (GDPR) compliance. IT executives in France need to understand the nuances that differentiate GDPR compliance, data sovereignty, cybercrime and espionage for better decision making around IT spending, security tools and service provider choices.

Trusted Cloud – Agence nationale de la sécurité des systèmes d'information (ANSSI) will issue SecNumCloud visa (certificates) for companies that have European shareholders (company ownership) and local or licensed foreign technologies. The certificate ensures data residency in Europe and data loss prevention tools are effective. Capgemini and Orange announced the creation of the first company, Bleu, under the Trusted Cloud title, ensuring French ownership while offering Microsoft's cloud technologies. Bleu should start operations in 2022. Outscale and OVHcloud were the first to be certified. ISG expects Scaleway to soon announce a Trusted Cloud certification.

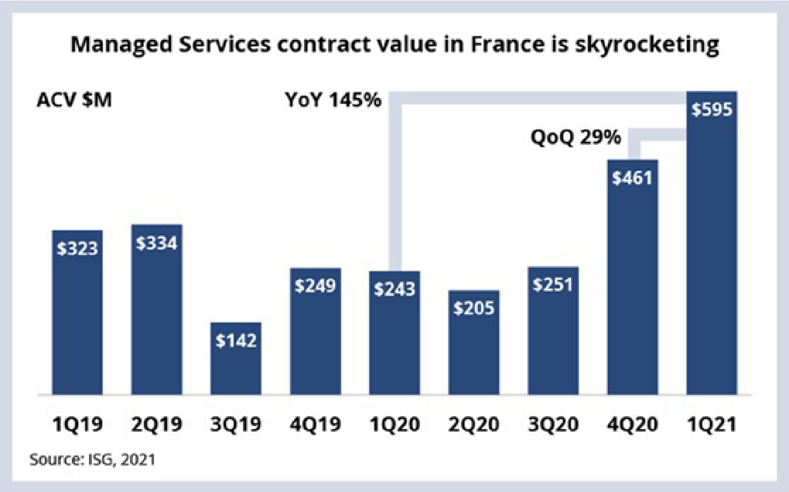
Cloud at the center – The French Government has mandated that any new digital project within the state will use the cloud. This is an extremely important commitment because of the government's spent impact on France's GDP. It also frees government agencies, para-public highly regulated companies to consider cloud first.

An ambitious industrial strategy – The French Government offers direct support for high value-added projects under the 4th Program of Investments for the Future and France Relance (economy recovery plan). It targets critical technologies such as Platform as a Service (PaaS) solutions for the deployment of AI and big data or collaborative work software suites. The program has identified five projects for which the government has committed more than €100 million.

French cloud market implications – ISG has identified three categories of companies in this context: The first group includes France-based multinationals such as Carrefour, Group Cassino and Renault that are using the public cloud with full GDPR compliance. Their operations and data are distributed across many countries; data sovereignty is intangible for the multinationals. The second group includes companies that are operating within France; they do not have concerns about data sovereignty and are not targets for espionage. Foreign access to their business data would not have any relevant impact. They are concerned with cybersecurity and GDPR compliance that any public cloud can provide. The third group comprises the French State, public agencies, regional authorities, hospitals and companies classified as Opérateurs d'Importance Vitale (OIV) and Opérateurs de Services Essentiels (OSE). This group holds citizens' health data, scientific research data, government secrets, detailed tax information and other confidential data that require data sovereignty. These companies were excluded from the public cloud in the past and, starting 2021, have clear directives to accelerate their digital transformations.

All trends are positive – France is ready for cloud market growth. Globally, ISG expects cloud contract value to increase by 21 percent in 2021, with traditional IT services seeing an 8 percent rise in contract value. Some of the recent developments in Europe in this context: HCL Digital Workplace Services' agreement with Airbus; BMW Group's announcement that it is migrating workloads to AWS, joining automakers Renault and Volkswagen on AWS; Amadeus signed a deal with Microsoft Azure; and AWS won an infrastructure-as-a-service (IaaS) contract with Ferrari. In addition, Digital Realty opened its third Paris-based data center and Equinix announced that it will create the first carrier-neutral data center in the Nouvelle-Aquitaine region.

The managed services contract value in France in the fourth quarter of 2020 and the first quarter of 2021 show two quarters of outstanding growth – up by 145 percent, year over year, and 29 percent, quarter over quarter.



Merges and acquisitions on the rise – There were 93 managed services acquisitions in the first half of 2021. Accenture, IBM, Tech Mahindra, Atos, Cognizant and EPAM have been the most active IT services providers through the first half of the year. The importance of the France in this market is illustrated by the acquisition of France-based cloud services provider, Linkbynet, by Accenture, and Edifixio, by Atos.

Focus on carbon emissions – All cloud providers, colocation providers and many service providers have committed to reducing their carbon footprint, including setting target dates to achieve zero emission. For clients, migration to the public cloud can accelerate their carbon reduction programs.

AI automation adoption – Managed service providers are increasing the use of AIOps, offering 40 to 70 percent automation, depending on their toolset and AI maturity.

FinOps requires integration – No FinOps tool offers all functionalities; clients can choose service providers that integrate FinOps tools to provide comprehensive cost management dashboards.

Multicloud is pervasive – Most service providers can support more than one cloud. The market is moving from IaaS (virtual machines to run all applications) to PaaS (cloud services such as databases and tools). A client can run its transaction services on a global cloud and keep sensitive data on a cloud de confiance. The right system architecture enables clients to run on many clouds, simultaneously.

Hyperscalers fiercely competing for SAP – The announcement of RISE with SAP in December 2020 has accelerated SAP migrations to the cloud in 2021. Clients can choose the cloud to host their SAP and hyperscalers are very competitive in assessing each SAP deal. Clients that promote competitive procurement can get benefits in the pre-sales phase, bringing about insightful discussions around business innovation and optimum cloud architecture to improve performance.

Introduction

Simplified illustration

Public Cloud – Service & Solutions 2021	
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

Source: ISG 2021

Definition

In the last financial year, the increase in public cloud adoption among enterprises was mainly triggered by the COVID-19 pandemic, along with other factors such as the growing digital transformation engagements, increasing recognition of the importance of cybersecurity and expanding remote working environments. The increased maturity of the cloud industry made a major impact on both enterprises and IT service providers, with both buyers and consumers witnessing a huge shift the buying behavior, from physical to digital. For enterprises, this has also impacted business models, requiring digital initiatives and prompting them to recognize the need to address governance, risk and compliance norms. Considering the widespread adoption of the as-a-service model, enterprises need to continuously evaluate cloud service providers, globally, mainly due to growing security concerns and the dynamic nature of the business landscape. Enterprises continue to seek providers that can

Definition (cont.)

act as strategic partners in carrying out cloud transformation engagements on major hyperscalers (AWS, Microsoft Azure and Google Cloud Platform). The provider will also continue to manage the workloads on an on-going basis, and help enterprises control, optimize and manage cloud expenses though FinOps strategies.

ISG reports a strong demand for digital transformation engagements, which, in turn, is driving global contracts for cloud products and services, including infrastructure-as-a-service (IaaS) and platform-as-a-service (PaaS). According to the latest 2Q21 ISG Index™, the global market has grown 32 percent in combined market annual contract value (ACV) to reach its current value of $19.1 billion year-over-year, while the as-a-service ACV has increased by 25 percent to reach $11.2 billion in the same period. Also, the IaaS market grew by 29 percent to reach $15.3 billion, while the SaaS market grew by 15 percent to reach $5.7 billion in the first half of 2021.

The ISG Provider Lens™ study offers the following to IT-decision makers:

- Strengths and weaknesses of relevant providers;
- A differentiated positioning of providers based on competitive strength and portfolio attractiveness;
- A perspective on several markets, including global, the U.S., the U.K., Germany, Switzerland, France, the Nordics and France.

This 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 leverage information from these reports to evaluate current vendor relationships and potential engagements.

Definition (cont.)

Scope of the Report

This study considers public cloud service providers including infrastructure hyperscalers and their service partners. These service providers qualified in the following six quadrants:

The **Consulting and Transformation Services for Large Accounts** quadrant assesses service providers and service integrators that partner with public cloud infrastructure providers to offer ideation of multicloud programs and industry cloud solutions, and manage customer-specific complexities related to adopting and deploying public cloud solutions. These providers focus on the large accounts market.

The **Consulting and Transformation Services for Midmarket** quadrant assesses the partners of public cloud infrastructure providers (hyperscalers) to offer ideation, strategy and planning related to cloud solutions, workload migrations and adoption of public cloud solutions, where they focus on clients in the midmarket.

The **Managed Public Cloud Services for Large Accounts** quadrant assesses service providers that offer professional and managed services on top of public cloud IaaS and PaaS from AWS, Microsoft Azure, Google Cloud Platform and other hyperscalers. These companies focus on large account clients.

The **Managed Public Cloud Services for Midmarket** quadrant assesses service providers that offer professional and managed services on top of public cloud IaaS and PaaS from AWS, Microsoft Azure, Google Cloud Platform and other hyperscalers, with focus on clients in the midmarket.

The **Hyperscale Infrastructure and Platform Services** quadrant assesses companies that provide virtual compute resources, middleware and software in a public cloud environment. Clients consume infrastructure and platform services on-demand.

The **SAP HANA Infrastructure Services** quadrant assesses cloud infrastructures optimized to host the SAP HANA database and SAP S/4HANA workloads. IaaS participants should offer data migration, system imaging, backup, restore, disaster recovery, resource usage monitoring and dashboard management services.

Provider Classifications

The provider position reflects the suitability of IT 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.

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

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.

Product Challenger

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.

Market Challenger

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.

Contender

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 both products and services and a sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

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).

Rising Star

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

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.

Public Cloud – Services & Solutions - Quadrant Provider Listing 1 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational 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
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	Not in	Contender	Not in	Contender	Not in	Not in
Be-Cloud	Not in	Contender	Not in	Contender	Not in	Not in
Birlasoft	Not in	Contender	Not in	Contender	Not in	Not in
Capgemini	Leader	Not in	Leader	Not in	Not in	Not in
CGI	Leader	Not in	Leader	Not in	Not in	Not in
Claranet	Not in	Leader	Not in	Leader	Not in	Not in
Cloud Temple	Not in	Rising Star	Not in	Product Challenger	Not in	Not in

Public Cloud – Services & Solutions - Quadrant Provider Listing 2 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational 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
Cloudreach	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	Product Challenger	Not in	Not in
Corexpert	Not in	Product Challenger	Not in	Contender	Not in	Not in
Crayon	Not in	Market Challenger	Not in	Contender	Not in	Not in
Devoteam	Not in	Leader	Not in	Leader	Not in	Not in
DXC	Leader	Not in	Product Challenger	Not in	Not in	Not in
Fujitsu	Contender	Not in	Contender	Not in	Not in	Not in
Google	Not in	Not in	Not in	Not in	Leader	Leader
HCL	Leader	Not in	Product Challenger	Not in	Not in	Not in
IBM	Product Challenger	Not in	Leader	Not in	Product Challenger	Product Challenger

Public Cloud – Services & Solutions - Quadrant Provider Listing 3 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational 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
Infosys	Contender	Not in	Contender	Not in	Not in	Not in
LTI	Rising Star	Not in	Product Challenger	Not in	Not in	Not in
Microsoft	Not in	Not in	Not in	Not in	Leader	Leader
NTT DATA	Contender	Not in	Contender	Not in	Not in	Not in
Oracle	Not in	Not in	Not in	Not in	Contender	Not in
Orange Business Services	Leader	Leader	Leader	Leader	Product Challenger	Not in
Outscale	Not in	Not in	Not in	Not in	Contender	Not in
OVHcloud	Not in	Not in	Not in	Not in	Product Challenger	Contender
oXya	Not in	Leader	Not in	Market Challenger	Not in	Not in
PASàPAS	Not in	Contender	Not in	Contender	Not in	Not in
Reply	Not in	Product Challenger	Not in	Contender	Not in	Not in

Public Cloud – Services & Solutions - Quadrant Provider Listing 4 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational 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
SAP	Not in	Not in	Not in	Not in	Not in	Product Challenger
ScaleSquad	Not in	Leader	Not in	Leader	Not in	Not in
Scaleway	Not in	Not in	Not in	Not in	Contender	Not in
SoftwareONE	Not in	Contender	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	Product Challenger	Not in	Product Challenger	Not in	Not in	Not in
Tech Mahindra	Contender	Not in	Contender	Not in	Not in	Not in
T-Systems	Product Challenger	Product Challenger	Product Challenger	Rising Star	Not in	Contender
Unisys	Product Challenger	Not in	Product Challenger	Not in	Not in	Not in
Wipro	Product Challenger	Not in	Rising Star	Not in	Not in	Not in

Public Cloud – Services & Solutions Quadrants

ENTERPRISE CONTEXT

Consulting and Transformation Services for Large Accounts

This quadrant is relevant to large enterprises in France that are evaluating consulting and transformation service providers. This quadrant report is centered around the current market positioning of these providers and how they address key challenges in large enterprise migration journeys to the public cloud environment.

Enterprises in France are working with consulting and transformation service providers to shift toward the public cloud, to accelerate their international growth. The utilization of cloud capabilities is battling problems like workload assessment, change management, the shortage of talented specialists, skill gaps, and uncertainties about integration of existing infrastructure. France also excels in promoting systems that value customer experience and accessibility. This report can help with choosing the right provider to overcome the challenges and address the difficulties mentioned.

For enterprises, the benefits of working with consulting and transformation service providers include advanced data-based workload assessment, transformation roadmaps, advisory on workload migration, re-architecture of legacy applications, integration of automation capabilities, adhering to the latest security requirements and optimizing cloud governance. Enterprises embracing the shift towards cloud should be looking for multi-cloud solutions to achieve a maximized value.

Enterprises in France are enhancing their existing e-commerce systems, accessibility to governance capabilities and working toward industry 4.0 models. The push toward hybrid and multicloud environments has increased the offerings from hyperscalers.

Consulting and transformation service providers can help to create a framework for workload migration based on a thorough understanding of the operating environment and data protection regulations.

Enterprises are increasingly shifting their focus from lift and shift toward long-term application modernization, hence re-architecture, code reviews and cloud-native environments. The willingness to invest in migration is rising further, not only due to the challenges mentioned, but due to the change of pace that is needed for a successful digitalization journey.

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 digital transformation drive in their enterprises.

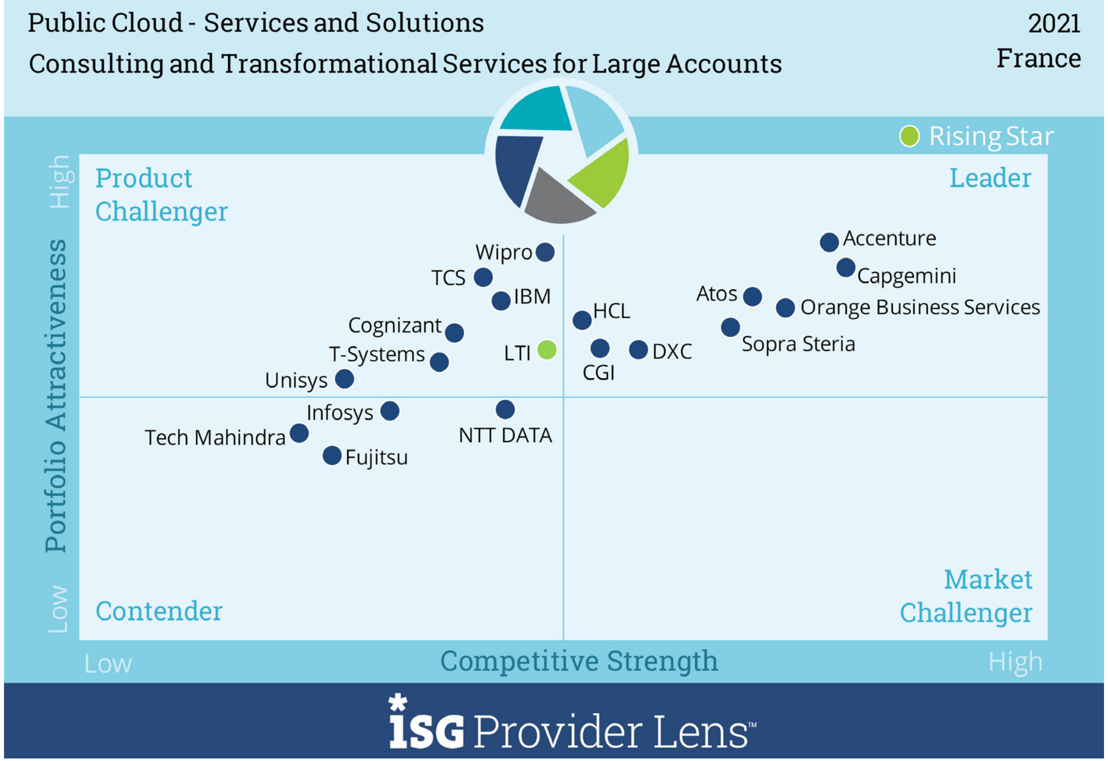
Software development and technology leaders should read this report to understand the positioning of consulting and transformation service providers, learn how those providers' offerings can impact an enterprise's ongoing transformation initiatives, and discover the benefits they can achieve by moving to the cloud.

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.

CONSULTING AND TRANSFORMATION SERVICES FOR LARGE ACCOUNTS

Definition

This quadrant assesses service providers or service integrators that offer consulting and transformation services for public cloud engagements. Public cloud enables enterprises to achieve agility and scalability without the need to invest in their own infrastructure, which makes it an integral aspect of digital transformation. Participating service providers have partnerships with public cloud infrastructure providers to offer ideation of multicloud programs, industry cloud solutions and manage customer-specific complexities of adopting and deploying public cloud solutions. These providers have highly skilled developers and software architects who leverage design thinking, SCRUM initiatives and short work cycles to meet growing customer demands.



Source: ISG Research 2021

CONSULTING AND TRANSFORMATION SERVICES FOR LARGE ACCOUNTS

Definition (cont.)

Provider services typically include the following:

- Consulting services: Consultants design a business case for cloud; assess a workload for migration; build a transformation roadmap, which includes addressing risk and compliance issues; and advise on migrating applications from the existing environment to a public cloud.
- Transformation services: Cloud experts design and build cloud architecture/environments, and migrate and integrate 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 has become a mainstream requirement from a CXO's office, the industry expects these to be an integral part of transformation engagements.

Eligibility Criteria

- Methods and frameworks to analyze a client's IT landscape, and help them avoid additional technical debts and realize value in their IT spending;
- Experience in planning and implementation of multicloud services for major industry verticals;
- Application migration experience (templates, automation engines and many more techniques) in conjunction with cloud-native application development for brownfield workloads;
- Hyperscale-provider-related partner program certifications;
- Robust APIs for application and service integration in public cloud;
- Ability to drive governance, risk and compliance for large transformation programs;
- Migration through cloud native application development for brownfield workloads.

CONSULTING AND TRANSFORMATION SERVICES FOR LARGE ACCOUNTS

Observations

The cloud consulting and transformation services market for large accounts in France has been observing an accelerated growth since the outbreak of the COVID-19 pandemic in 2020. The pandemic exposed the shortcomings of on-premises infrastructure and helped realize the resiliency that public cloud can provide. Private and public companies, as well as governments at all levels, realized the strategic importance of the cloud for the French market.

A survey sponsored by AWS in 2021 asked business leaders about the importance of the cloud in France, and 61 percent expressed that their business or operating model would not be possible without the cloud.

In this study, ISG observed that service providers have improved their cloud portfolio in response to a surge in demand. Even the most conservative consulting companies are hiring and certifying their experts in cloud technologies.

Without a doubt, the French market is eager to accelerate cloud adoption. However, government concerns around data privacy and data sovereignty create some level of uncertainty for IT leaders. In response, leading service providers can help enterprises better understand regulations and their ramifications and design solutions that fully comply with the strictest regulations.

Of the 46 service providers assessed in this study, 19 have qualified for this quadrant, and eight were named as Leaders and one a Rising Star.

- **Accenture** has a robust organization in France. A series of acquisitions in the country and in other parts of Europe have strengthened its competitive position. Accenture has clear focus on cloud transformation and works closely with hyperscalers, which enables it to handle complex cloud transformations.
- **Atos** offers a broad portfolio of solutions that enhance cloud performance with cybersecurity, compliance, data analytics and hybrid cloud, including business consulting around industry 4.0, edge computing and environmental, social and corporate governance.

CONSULTING AND TRANSFORMATION SERVICES FOR LARGE ACCOUNTS

Observations (cont.)

- **Capgemini** is one of the largest IT service providers in France. It offers a broad portfolio, including advanced consulting capabilities. Its cloud transformations leverage mature automation tools and service frameworks that accelerate large scale transformations.
- **CGI** has long been operating in France, nurturing long lasting client relationships in private and public sectors. It has improved its focus on cloud transformations with more certifications and case studies in 2021. Cloud transformation complements its comprehensive IT outsourcing portfolio.
- **DXC Technology** is a global service provider with strong cloud sales and delivery capacity, making it a top partner of AWS, Google Cloud Platform, Microsoft Azure and Oracle Cloud Infrastructure. It leverages a robust global organization, with long established experience in the French market.
- **HCL** has been building on proprietary tools that provide it with differentiation and accelerated growth. Clients benefit from well-structured frameworks that speed cloud transformations and add innovation. HCL is very competitive as it blends automation, innovation, onshore (Europe) and offshore (India) capacity.
- **Orange Business Services (Orange)** leverages its well-known brand presence and large-scale operations in France. It has invested in acquisitions and certifications to build a strong cloud services organization that has acquired new clients and has been observing strong growth in 2021.
- **Sopra Steria** has, in France, its largest operation in Europe. The company offers a broad IT service portfolio with strong capabilities in application modernization that optimizes cloud transformation results. Sopra Steria is expert in transforming applications and data in compliance with strict regulations in France.
- **LTI** (Rising Star) offers France-based enterprises a robust toolset to accelerate cloud adoption and innovation. It addresses cloud transformations with pragmatism, leveraging world-class best practices that are incorporated into advanced AI-automation to deliver reliability and performance in the cloud.

ORANGE BUSINESS SERVICES

Overview

Orange Business Services (Orange) is a division of the Orange Group, focused on IT services. It serves more than 3,500 enterprise clients with 27,000 employees. The company's portfolio includes software-defined networks, multicloud services, data and AI, smart mobility services, and cybersecurity. Orange partners with AWS, Microsoft Azure, Google Cloud Platform and OVHcloud to support compliant hybrid clouds.

Strengths

Data-centric cloud architecture: Orange understands the importance of data for a client's digital business success. Its consulting and transformation experts put data governance at the center. Orange has more than 2,200 data experts and has filed more than 500 patents in AI and big data. The company's expertise in data lakes and analytics can help clients get more value from cloud PaaS.

Expert in data privacy and sovereignty: Orange itself is a Vital Importance Operator (OIV) subject to compliance with top regulations in France. Clients benefit from the learnings it gets from managing its parent company's data. It handles more than 15 billion anonymized data sets every day. Orange is a Gaia-X founding member, providing clients updated compliance solutions in France. The company co-created Bleu with Capgemini, a cloud infrastructure company that will host and run Microsoft Azure and O365 in France in compliance with data sovereignty requirements. Bleu will start operations in 2022.

End-to-end consulting services: Orange offers a comprehensive portfolio, from connectivity to data analytics, covering all services the cloud can offer. It can merge software defined networking (SDN), cybersecurity, threat defense and digital workplace services to complement a client's cloud design. Orange multi-cloud services are scalable and flexible, offering an automated operational model, including AIOps and FinOps.

Caution

Orange offers application modernization and SAP migrations and operations in the cloud. However, it should expand its industry vertical knowledge to reduce its dependence on partners for these activities. A broader portfolio would consolidate Orange's position as a Leader in this quadrant.

2021 ISG Provider Lens™ Leader

Orange's in-depth knowledge of the French market and its access to a broad ecosystem, including local experts, enables it to provide differentiated services for large accounts.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ Public Cloud – Services & Solutions" analyzes the relevant software vendors/service providers in the France market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of the Public Cloud – Services & Solutions, France market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Use of ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

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Distinguished analyst and author, Pedro brings extensive experience in research of the Americas and SEMEA (Southern Europe Middle East and Africa) 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 Asia Pacific. 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.

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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 research director, principal analyst 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.

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