ISG Provider Lens™

Public Cloud – Services & Solutions

Consulting and Transformation Services for Midmarket

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.

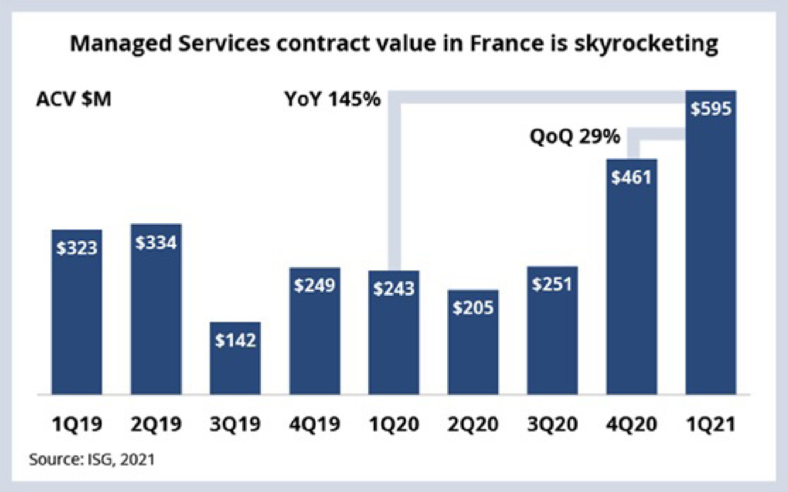
Cloud at the center – The French Government has mandated that any new digital project within the state will use the cloud. This is an extremely important commitment because of the government's spent impact on France's GDP. It also frees government agencies, para-public highly regulated companies to consider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

This quadrant is relevant to midsized 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 are shifting toward the public cloud and working with consulting and transformation service providers to overcome the difficulties such as workload assessment, change management, a shortage of talented specialists, skill gaps, and uncertainties about integration of existing infrastructure. In 2021, many enterprises are accelerating their digital transformation focused on customer experience and improving systems, but some transformations may have been implemented too hastily. 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 toward the cloud should be looking for multicloud solutions to achieve a maximized value.

Midsized enterprises in France are adapting to new directives from projects like Gaia-X and European directives like the GDPR, which highly favor cloud native concepts.

Enterprises are increasingly adapting the principles and paradigm shift surrounding the cloud native concept, which allows for a multitude of solutions with the goal to break up monolithic structures. Overall, the benefits of increased resilience, flexibility and scalability are too valuable for modern enterprises to pass up.

Midsized enterprises find themselves with more cost-effective investment options beyond lift and shift, there are now a lot of "drop-and-shop" options that can easily be tailored to individual customers by a knowledgeable partner. These repurchasing solutions are fulfilling the new cloud native standards that independent software vendors are striving for.

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.

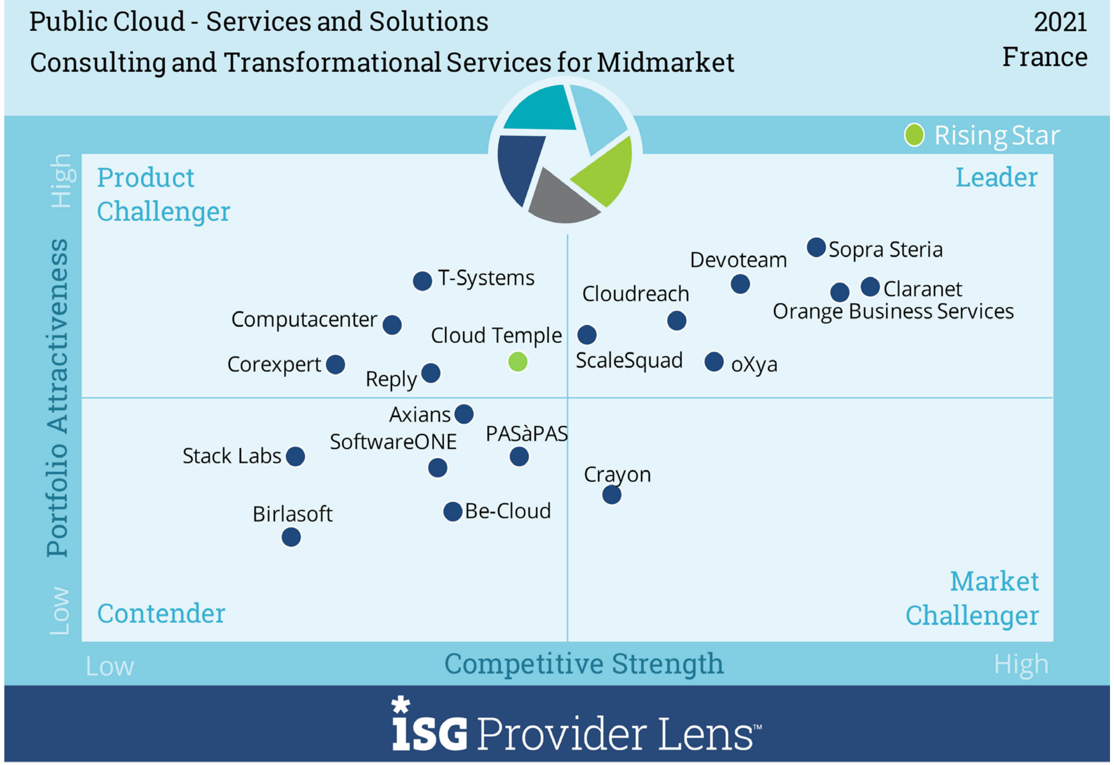
Software development and technology leaders should read this report to understand the positioning of consulting and transformation service providers, learn how those providers' offerings can impact an enterprise's ongoing transformation initiatives, and discover the benefits they can achieve by moving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

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 MIDMARKET

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 MIDMARKET

Observations

The cloud consulting and transformation services midmarket continues to show robust growth as observed in the previous years. The COVID-19 pandemic further pushed cloud adoption as companies running in the cloud had better conditions to work under the imposed social distancing. With market growth, ISG noted several merges and acquisitions in 2020 and 2021, demonstrating that the market is maturing and becoming more competitive. Service providers are investing in certifications to better serve their clientele. Most of the service providers in this quadrant have acquired more certifications and some have increased partner certifications.

Of the 46 service providers assessed in this study, 17 have qualified for this quadrant, of which seven were named Leaders and one is a Rising Star.

- **Claranet** is a pioneer in offering cloud consulting and migration services in Europe. It entered the French market through acquisitions, leveraging local talents to support French companies. The company offers a broad portfolio, including top certificates for AWS, Google Cloud Platform and Microsoft Azure.
- **Cloudreach** is a cloud-native company founded in the U.K., with a growing presence in France. It partners with the top three hyperscalers and offers automation tools and seasoned cloud resources to bring innovation with leading cloud technologies.
- **Devoteam** was founded in France and has expanded throughout Europe. It had deep expertise in application development before it acquired leading niche cloud companies in Europe, acquiring top certifications and expertise on the three hyperscalers.
- **Orange Business Services** is a business unit of Orange, and a large multinational corporation. Orange offers a service platform to handle hundreds of enterprise clients, and local offices covering all French territory. It partners with the top three hyperscalers and has been improving its cloud consulting practice.
- **oXya** was founded in France and later acquired by Hitachi Vantara. It is a flexible and agile organization backed by a global corporation. It focuses on SAP migrations to AWS, Google Cloud Platform and Microsoft Azure, with deep expertise in this area.
- **ScaleSquad** has exclusive focus on cloud consulting and managed services. It is part of the Neurones Group. The company has developed a proprietary cloud transformation framework that leverages automation for rapid and safe cloud migrations.

CONSULTING AND TRANSFORMATION SERVICES FOR MIDMARKET

Observations (cont.)

- **Sopra Steria** is a well-known brand in France, offering a comprehensive IT service portfolio. It serves companies of all sizes across industries. Sopra Steria partners with six hyperscalers and additional data center providers to deliver hybrid cloud solutions.
- **Cloud Temple** (Rising Star) offers data center and cloud services. It partners with the three top hyperscalers and uses its data center for data compliance. Cloud Temple is growing in France, and is improving its certification levels with a clear focus on public cloud.

ORANGE BUSINESS SERVICES

Overview

Orange Business Services is an IT service provider and division of the Orange Group. It serves more than 3,500 enterprise clients with 27,000 employees. Orange is an AWS Advanced Consulting and MSP partner, Microsoft Azure partner and Azure Networking MSP, Google Cloud Platform Premier Partner and MSP, and a OVHcloud partner.

Strengths

Strong presence in France: Orange leverages its parent company's countrywide presence. Clients can access more than 2,400 cloud experts and 3,900 AI, data and digital experts. Orange can respond to clients' demands around security, compliance and data sovereignty with many service and solution partners in the country. The Orange Flexible Engine Cloud platform supplements its offering, enabling clients to host their applications and data in the country, according to their specific needs.

Cloud transformation expertise: Orange provides multicloud-based services, including connectivity, cybersecurity, managed services, data services and AI analytics. It has been strengthening its cloud position. With AWS, it has partnered to deliver new solutions in the areas of modernization and migration, data analytics, innovation and security, resulting in new products and services to fast-track clients' journeys to the cloud. Orange has agreed to host an AWS Cloud center of excellence for the joint development of an extensive training and certification program for its experts.

True cloud-native transformations: Orange helps clients in refactoring their applications to leverage cloud services. It designs serverless architectures to replace application logic with AWS Lambda functions, AWS IAM and AWS KMS for strong security. It offers virtual private cloud and virtual private network (VPN) to integrate on premises applications and cloud serverless services. Cloud transformations use Azure's Cloud Adoption Framework and Google Cloud Platform best practices.

Caution

Orange's expansive portfolio covers a broad market, including data center, hosting, networking, IoT, 5G, digital workplace, private and public cloud, and other services for customers of all sizes. Orange should consider specialized business units to enable client intimacy and focus to resolve the specific needs of midsize companies.

2021 ISG Provider Lens™ Leader

Clients can choose among many technologies and platforms to accelerate their cloud transformation when dealing with Orange.

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

Authors and Editors

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Distinguished Analyst

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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Research Analyst

Katharina Kummer is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Public Cloud Transformational Services, Private Hybrid Cloud Data Centre, Data Analytics, Microsoft Ecosystem and Cloud Native – Container Services. Her areas of expertise lie in cloud, data center, cloud native services, digital linguistics and NLP. Katharina develops content from an enterprise perspective and author the global summary report. Along with this, she supports the lead analysts in the research process and ad-hoc research assignments and writes articles about niche technologies, market trends and insights.

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Partner and Global Head – ISG Provider Lens/ISG Research

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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