ISG Provider Lens™

Public Cloud – Solutions & Services

Consulting and Transformation Services for Large Accounts

France 2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

Orange Business Services

November 2020

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 August 2020, 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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ISG Provider Lens™

ISG Provider Lens™

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EXECUTIVE SUMMARY

France is the third-largest European economy and the seventh-largest in the world, with a GDP of $2.8 trillion. Its robust economy has suffered the impacts of the COVID-19 pandemic that has hit France harder than other countries in Europe because of the lock-down of the government during the pandemic. Government spending accounts for 56 percent of France's GDP in a typical year.

Companies participating in this study, the public cloud service partners, have reported that cloud adoption in France has been slower than in the Americas and other countries in Europe. The information collected for this study about cloud service revenue per country confirms the general market perception that the French cloud market is smaller than expected for such a large economy. The media in general speculates about French restrictions that include security concerns, privacy regulations, the small number of cloud data centers in the country and cultural issues. However, the reasoning could be much simpler: French enterprises had no business reason to embrace the cloud until COVID-19 outbreak imposed social distancing and created a reason to move to the cloud.

As in other countries, the pandemic pushed cloud consumption. Some providers have reported up to a 40 percent increase in demand for certain industry verticals. In addition, cloud resources had to be provisioned to support essential government services and healthcare. The cloud scalability and automation provided by cloud service partners were instrumental. These partners also helped contain the rapid increase in cyberattacks targeting governments and hospitals. The pandemic triggered an accelerated move to the cloud that may close France's cloud adoption gap.

Consulting and Transformation

The rapidly increasing demand for cloud transformation, pushed by the COVID-19 pandemic, has triggered enterprise companies' interest in moving larger workloads to the cloud, including essential public services and core business applications. This movement also triggered concerns regarding data privacy location and intellectual property protection.

Consulting and transformation service providers that excel in automating the move of large workloads to the cloud are now getting more attention from French companies. Major concerns include privacy data protection for GDRP compliance, multi-cloud arrangements and cost management. The trend is to modernize legacy applications and deploy infrastructure automation to enable secure DevOps and containers supporting an Agile development organization.

Governance, Risk and Compliance

Privacy concerns and GDPR do not restrict cloud adoption. However, wrong configurations and a lack of tools can expose companies to risk and non-compliance. GRC services are emerging to help companies make better use of cloud resources. What providers told ISG for this study is that they find different levels of client maturity. Many companies deploy cloud services trusting that the service providers or hyperscalers are responsible for compliance. Only mature organizations understand that compliance is the sole responsibility of the client using the cloud.

Managed Public Cloud Services

For client companies operating in the cloud, few enterprises have migrated everything to the cloud. Most service providers describe their clients as gradually moving one system (workload) after the other in a paced migration, rather than taking a big-bang approach. In France, as well as in other countries, leading enterprises are starting to move their core applications to the cloud.

When it comes to diversity of providers, this study finds Indian service companies are struggling to grow in France. In the seven quadrants of this study, 28 percent of the participants are French companies and 46 percent of the Leaders are French. There is no distinction in terms of technologies. French or international providers have the automation tools required to provide world-class services. With the exception of Accenture and IBM, foreign companies have a small number of offices in France.

There is an increasing demand for application modernization and the support of cloud-native applications. Service providers guide clients in choosing public cloud tools to build automated CI/CD pipelines that are essential to scale Agile development. Consequently, container management is also on the rise.

Most service providers have implemented AIOps (artificial intelligence to improve operations automation) using machine learning to identify recurrent issues and services requests in order to select candidates for automation. AIOps can now reduce up to 70 percent of manual tasks. Last year, the same providers reported up to 50 percent task reduction. However, we are referring to best-case scenarios, not averages. AIOps is rapidly becoming commonplace.

SAP Hana Infrastructure Services

Moving SAP to the public cloud has been a hot topic throughout 2019 and 2020. Clients can benefit from the lower cost of infrastructure while freeing capital to invest in their business. SAP demands costly hardware to compete with other business investment priorities. However, the investment versus rent decision happens in only two occasions: when legacy hardware has reached its end-of-life, typically five years after the acquisition, or when the client decides to upgrade the ERP version, which typically requires hardware upgrades. One of these two reasons triggers the decision to migrate the ERP to the cloud. Not surprisingly, SAP, AWS, Microsoft and Google want to shorten the clients' decision cycle.

Service partners report that hyperscalers can provide incentives to accelerate SAP move to the cloud in certain cases. With incentives, clients can migrate their SAP applications to the cloud without any upfront fee, making it a compelling case in times of economic turmoil experienced in 2020.

Hyperscale Infrastructure and Platform Services

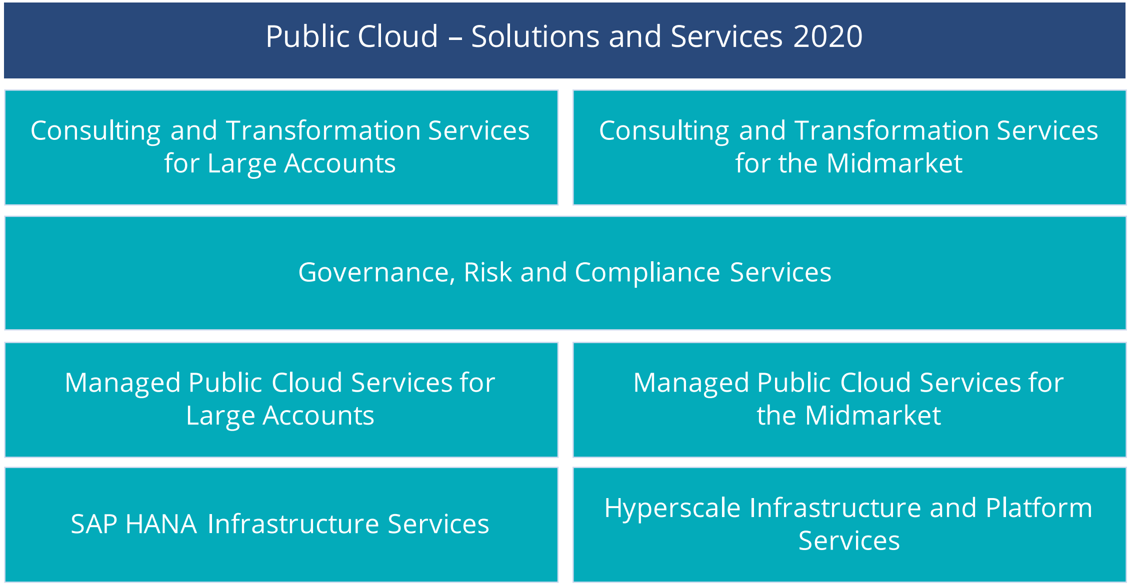
Antitrust policies and data privacy concerns surface the discussions around cloud sovereignty that drove the creation in 2019 of a consortium of European countries, the GAIA-X initiative. In September 2020, the GAIA-X initiative announced the official signing of incorporation papers for GAIA-X AISBL (association internationale sans but lucratif), a nonprofit association that will drive the GAIA-X Initiative. The 22 founding members signed the documents in Brussels for securing funding and commitment from members to fulfill the initiative's vision for Europe.

According to the announcement, "the creation of digital ecosystems requires building trust and interoperability across all cloud users and providers." However, the hyperscalers have already built their ecosystems in Europe, including hundreds of local service providers that sell, install, and manage European companies' data in public clouds that reside in-country. No data is going outside Europe. The trust exists and data sovereignty is under control.

The GAIA-X initiative represents the economic interest of a few companies. If it succeeds, French enterprises will end up paying more for local cloud providers, negatively impacting their digital competitiveness globally. In the short term, however, GAIA-X imposes no threats to global hyperscalers.

Introduction

Simplified illustration



Source: ISG 2020

Definition

The growth in public cloud adoption among enterprises and the maturity of the cloud industry are creating a major impact on both enterprises and IT service providers and on business models, requiring increased acceptance of digital initiatives and creating risks of obsolescence. Considering the widespread adoption of the as-a-service model, enterprises need to continuously evaluate cloud services and IT providers globally.

Definition (cont.)

ISG reports that the strong demand for digital transformation 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 1Q20 ISG Index™, the global market has grown 7 percent in combined market annual contract value (ACV) since Q4 2019, to reach its current value of $14.8 billion. In the same period, as-a-service ACV has increased by 11 percent to reach $7.9 billion. Also, the IaaS market grew 18 percent to $5.9 billion and the SaaS market dropped by 4 percent to $2 billion. The growth in numbers in the as-a-service area indicates the shift to and preference for

Scope of the Study

digital technologies to reduce costs, increase productivity, improve responsiveness to business requirements, improve service to end users and ultimately drive innovation.

As part of this quadrant study, ISG is introducing the following seven quadrants on public cloud solutions and services.

Consulting and Transformation Services for Large Accounts: This quadrant includes service providers that partner with public cloud hyperscalers to design a business case to move to the cloud, assessing the migration workload and building a transformation roadmap. For transferring workloads to the cloud, these service providers offer cloud architecture design, migration and integration services. Large accounts include providers that focus on large clients, usually supporting more than 5,000 users for enterprises with more than $1 billion in annual revenue.

Consulting and Transformation Services for the Midmarket: Service providers in this quadrant partner with public cloud hyperscalers to design a business case to move to the cloud, assessing the migration workload and building a transformation roadmap. For transferring workloads to the cloud, these service providers offer cloud architecture design, migration and integration services. The midmarket includes service providers that focus on midsized enterprise clients. Typical client

Definition (cont.)

revenue is under $1 billion annually or their user base is under 5,000 users. Service providers in this quadrant usually support a large IaaS workload distributed over a broad client base.

Governance, Risk and Compliance Services: This quadrant assesses consulting firms that offer various frameworks, policies, processes and functions to ensure enterprise cloud workloads are run in secure and compliant environments, regardless of their location.

Managed Public Cloud Services for Large Accounts: In this quadrant, we evaluate managed service providers (MSPs) that operate the public cloud for their clients. Services include provisioning, monitoring and operations of IaaS and PaaS solutions. Managed Public Cloud Services for Large Accounts includes MSPs that focus on large clients, usually supporting more than 5,000 users for enterprises with more than $1 billion in annual revenue.

Managed Public Cloud Services for the Midmarket: Managed service providers in this quadrant operate the public cloud for their clients. Services include provisioning, monitoring and operations of IaaS and PaaS solutions. Managed Public Cloud Services for the Midmarket includes MSPs that focus on midsized enterprise clients. Typical client revenue is under $1 billion annually or their user base is under 5,000 users. Service providers in this quadrant usually support a large IaaS workload distributed over a broad client base.

SAP HANA Infrastructure Services: In this quadrant, we examine cloud infrastructures best suited to host the SAP software portfolio, with emphasis on SAP S/4HANA workloads and large-scale HANA databases. Participating vendors offer infrastructure-as-a-service (hyperscale IaaS), including infrastructure operations, facilities, provisioning and scaling capacity, on a pay-as-you-go model.

Hyperscale Infrastructure and Platform Services: This quadrant covers public cloud providers of IaaS, including computing services (virtual machines), storage and network with access security. These vendors also offer PaaS, such as serverless computing, database as a service, microservices for low-code/no-code platforms, AI/ML services, cognitive computing, document storage, and ready-to-use, third-party applications marketplaces.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The "Leaders" among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The "Product Challengers" offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or their weak footprint within the respective target segment.

Market Challenger

"Market Challengers" are also very competitive, but there is still significant portfolio potential and they clearly lag behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

"Contenders" are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

"Rising Stars" are usually Product Challengers with high future potential. Companies that receive the Rising Star award have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12 to 24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.

Public Cloud – Solutions & Services - Quadrant Provider Listing 1 of 3

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
Accenture	Leader	Not in	Leader	Leader	Not in	Not in	Not in
Alibaba	Not in	Not in	Not in	Not in	Not in	Not in	Contender
Atos	Leader	Not in	Market Challenger	Leader	Not in	Product Challenger	Not in
AWS	Not in	Not in	Not in	Not in	Not in	Leader	Leader
Axians	Contender	Not in	Contender	Contender	Not in	Not in	Not in
Be-Cloud	Not in	Product Challenger	Not in	Not in	Contender	Not in	Not in
Birlasoft	Not in	Contender	Not in	Contender	Not in	Not in	Not in
Capgemini	Leader	Not in	Leader	Leader	Not in	Product Challenger	Not in
CGI	Product Challenger	Not in	Contender	Product Challenger	Not in	Not in	Not in
Claranet	Not in	Leader	Not in	Not in	Leader	Not in	Not in
Cloud Temple	Not in	Contender	Not in	Not in	Leader	Not in	Not in
Cloudreach	Not in	Rising Star	Not in	Not in	Leader	Not in	Not in
Cognizant	Product Challenger	Not in	Product Challenger	Product Challenger	Not in	Not in	Not in
Crayon	Not in	Contender	Not in	Not in	Contender	Not in	Not in
Deloitte	Product Challenger	Not in	Leader	Product Challenger	Not in	Not in	Not in

Public Cloud – Solutions & Services - Quadrant Provider Listing 2 of 3

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
Devoteam Revolve	Not in	Leader	Not in	Not in	Product Challenger	Not in	Not in
DXC	Leader	Not in	Not in	Leader	Not in	Not in	Not in
Edifixio	Not in	Leader	Not in	Not in	Rising Star	Not in	Not in
EY	Not in	Not in	Product Challenger	Not in	Not in	Not in	Not in
Fujitsu	Contender	Not in	Not in	Product Challenger	Product Challenger	Not in	Not in
Google	Not in	Not in	Not in	Not in	Not in	Leader	Leader
HCL	Rising Star	Not in	Not in	Rising Star	Not in	Not in	Not in
Henson Group	Not in	Contender	Not in	Not in	Contender	Not in	Not in
IBM	Leader	Not in	Not in	Leader	Not in	Product Challenger	Product Challenger
KPMG	Not in	Not in	Leader	Not in	Not in	Not in	Not in
LINKBYNET	Not in	Leader	Not in	Not in	Leader	Not in	Not in
LTI	Product Challenger	Not in	Product Challenger	Product Challenger	Not in	Not in	Not in
Microsoft	Not in	Not in	Not in	Not in	Not in	Leader	Leader
Neurones IT	Not in	Leader	Not in	Not in	Leader	Not in	Not in
NTT	Leader	Not in	Not in	Leader	Not in	Not in	Not in

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

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Governance, Risk and Compliance Services	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services
Orange Business Services	Leader	Not in	Not in	Leader	Not in	Not in	Not in
Oracle	Not in	Not in	Not in	Not in	Not in	Not in	Product Challenger
OVHcloud	Not in	Not in	Not in	Not in	Not in	Contender	Rising Star
oXya	Not in	Rising Star	Not in	Not in	Contender	Not in	Not in
PwC	Not in	Not in	Product Challenger	Not in	Not in	Not in	Not in
Reply	Not in	Product Challenger	Not in	Not in	Contender	Not in	Not in
SAP	Not in	Not in	Not in	Not in	Not in	Product Challenger	Not in
SoftwareONE	Not in	Contender	Not in	Not in	Contender	Not in	Not in
Sopra Steria	Leader	Leader	Market Challenger	Leader	Leader	Not in	Not in
Stack Labs	Not in	Contender	Not in	Not in	Contender	Not in	Not in
TCS	Product Challenger	Not in	Not in	Product Challenger	Not in	Not in	Not in
Tech Mahindra	Contender	Not in	Not in	Contender	Not in	Not in	Not in
T-Systems	Not in	Leader	Not in	Not in	Market Challenger	Product Challenger	Not in
Unisys	Product Challenger	Not in	Not in	Product Challenger	Not in	Not in	Not in
Wipro	Product Challenger	Not in	Not in	Product Challenger	Not in	Not in	Not in

Public Cloud – Solutions & Services Quadrants

ENTERPRISE CONTEXT

Consulting and Transformation Services – Large Accounts

This quadrant is relevant to large enterprises in France that are evaluating consulting and transformation service providers. In this quadrant report, ISG lays out the current market positioning of these service providers in France and how they can address key challenges in large enterprises' migration journeys to the public cloud environment.

Enterprises have been reluctant to migrate to the public cloud owing to difficulties such as assessing the workloads, change management, a shortage of talented specialists or skill gaps, data privacy, and uncertainties about integration of existing infrastructure. In 2020, however, the urge to move workloads to the public cloud has become more pressing than ever and many enterprises are accelerating their digital transformation. 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 experienced workload assessment, transformation roadmaps, advisory on workload migration, re-architecture of legacy applications and integration of automation capabilities.

Enterprises in France have begun to exit mainframe systems and migrate larger workloads to the cloud. These enterprises are working with service providers that engage end-to-end transformation from cloud advisory to management of systems in the cloud. Data sovereignty requirements for enterprises in France have been increasing as cloud adoption has become mainstream in recent years.

ISG sees that enterprises are leveraging the consulting and transformation service providers' expertise to redesign their architecture to operate in cloud-native environments and are willing to invest in their cloud 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.

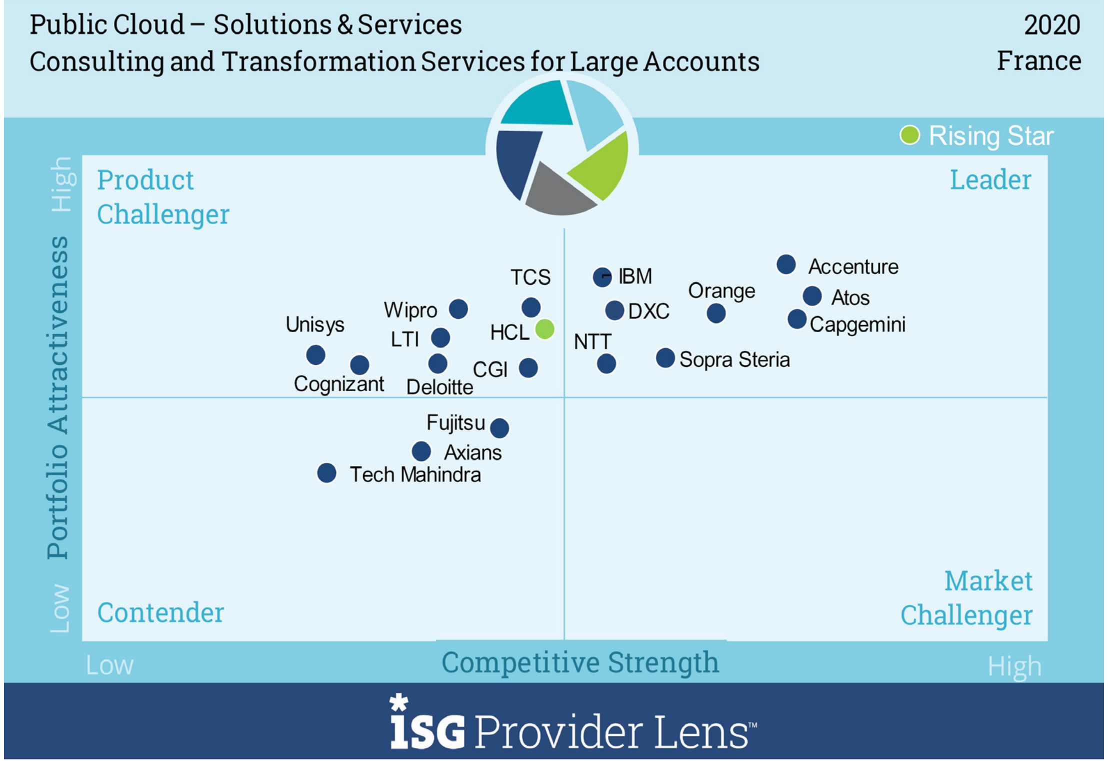
Sourcing, procurement, and vendor management professionals should read this report to develop a better sense of the current landscape of consulting and transformation service providers in France.

CONSULTING AND TRANSFORMATION SERVICES FOR LARGE ACCOUNTS

Definition

Public cloud enables enterprises to achieve agility and scalability without investing in their own infrastructure, thus making it an integral aspect of digital transformation. Consulting and transformation service providers partner with public cloud providers to manage customer-specific complexities of adopting and deploying public cloud solutions. Their services typically include the following:

- **Consulting services:** Designing a business case for the cloud; assessing the workload for migration; building a transformation roadmap, which includes addressing risk and compliance issues; and advising on migrating applications from the existing environment to that of a public cloud provider.
- **Transformation services:** Designing and building the cloud architecture/environments, migrating and integrating applications, and optimizing the architecture to harness cloud-computing features and benefits.



Source: ISG Research 2020

CONSULTING AND TRANSFORMATION SERVICES FOR LARGE ACCOUNTS

Eligibility Criteria

For this quadrant, we exclude the creation of private clouds because they are covered in a separate study on Next-Gen Private/Hybrid Cloud Data Center Service and Solution Providers. Accordingly, the Public Cloud Consulting and Transformation Services quadrant encompasses the adoption of public cloud services and their integration with on-premises environments, which can include private clouds.

The large accounts segment includes service providers that focus on large clients, usually supporting more than 5,000 users for enterprises with more than $1 billion in annual revenue.

Eligibility Criteria

- Public cloud transformation thought leadership.
- Methods and frameworks to analyze the client IT landscape.
- Experience in the planning and implementation of multi-cloud services.
- Application migration experience, including templates, automation engines and partnerships with independent software vendors (ISVs).
- Hyperscale provider-related partner program certifications from the solutions standpoint.
- Competencies that are specific to a vertical (industry) or technology.
- Client references and projects or use cases.
- Hybrid cloud integration and support services.

CONSULTING AND TRANSFORMATION SERVICES FOR LARGE ACCOUNTS

Observations (cont.)

The rapidly increasing demand for cloud transformation, pushed by the COVID-19 pandemic, has triggered enterprise companies' interest in moving larger workloads to the cloud, including essential public services and core business applications. This movement also triggered concerns regarding data privacy location and intellectual property protection, accelerating French companies' support to the GAIA-X initiative, created in 2019 to discuss alternatives for data sovereignty.

Key trends observed include legacy application modernization, multi-cloud deployments, cost reduction focus and increasing interest in solutions to support cloud-native application development. Cloud vendors continue to provide incentives for partners and clients when moving SAP workloads to the cloud.

This study has assessed 51 providers and classified 19 in this quadrant. Eight are Leaders and one is a Rising Star.

- **Accenture,** which reported $43 billion in revenue in fiscal 2019, has over 506,000 employees in 51 countries, including about 7,000 in France. It invested $5 billion in more than 100 acquisitions in the last five years. Recent acquisitions in France include Sentelis (2020), a consulting and data engineering company; Gekko (2020), an AWS service partner; and Cirruseo (2019), a Google Cloud service partner. Accenture has a robust cloud-consulting practice and top accreditations from AWS, Google and Microsoft Azure,
- **Atos** provides digital transformation with 110,000 employees in 73 countries and annual revenue of €12 billion, including €1.8 billion in revenue and 12,000 employees in France. The company offers hybrid cloud, big data, business applications and digital workplace solutions. Acquisitions in 2020 include Maven Wave, a U.S.-based cloud and technology consulting firm; Alia Consulting; EcoAct; digital.security; Paladion; and Miner & Kasch. Atos has long experience in transforming applications to improve business performance, with 10 delivery centers in France to support local clients.
- **Capgemini** reported €14 billion in revenue in 2019, with 214,000 employees spread across 40 countries. France represents 21 percent of group revenue, accelerated by more than 5 percent growth in the past year. It employs more than 27,000 people in France and Morocco. Strategy and transformation consulting accounts for about 7 percent of total revenue. Capgemini Cloud Platform (CCP) is at the core of the company's cloud offerings. It uses a set of services and accelerators to migrate, operate and innovate in the cloud.

CONSULTING AND TRANSFORMATION SERVICES FOR LARGE ACCOUNTS

Observations (cont.)

- **DXC Technology** is a global company with$19.6 billion revenue and 138,000 employees serving 6,000 private sector and public sector customers in 70 countries. It acquired Luxoft in 2019 and Virtual Clarity in 2020, strengthening its capabilities in digital engineering and cloud migration. An ecosystem of more than 200 partners helps the company deliver end-to-end IT services. DXC has been operating in France for more than 60 years. It has about 3,000 employees across two centers of excellence in Toulouse and a digital center in Paris.
- **IBM** has been operating in France since 1914. The company has 19 sites in France, including the IBM Global Industry Solution Center Nice-Paris and IBM Client Centers in Montpellier and in Bois-Colombes. In 2018, IBM opened a security operations center (SOC) in Lille. IBM Services for Enterprise Cloud Strategy helps create a holistic cloud strategy that connects business goals to IT architecture. IBM offers IBM Cloud and it partners with AWS, Google and Microsoft to provide consistent managed services across hybrid and multi-cloud environments in service consumption models.
- **NTT Ltd.** was recently formed by bringing together 40,000 people from 28 companies, including NTT Communications, Dimension Data, CAPSiDE and NTT Security. NTT has more than 10,000 clients in over 200 countries, including four locations in France. The company provides a cloud migration strategy with security and efficiency in mind. The portfolio includes consulting, technical services and integration. NTT merges its long expertise in infrastructure with creativity and originality from the acquired companies to deliver secure and innovative cloud transformations.
- **Orange Business Services** is the global enterprise division of the Orange Group. With 27,000 employees, Orange Business Services supports clients in their digital transformation. The service division reported a €7.8 billion revenue in 2019, serving 3,000 multinational enterprises in 200 countries. In 2018, it acquired Basefarm and its subsidiary, The Unbelievable Machine Company, to strengthen its capacity in Europe. Orange has more than 2,400 cloud experts to provide a secure path to the public cloud, enabling large enterprises to embrace vigorous digital transformations.

CONSULTING AND TRANSFORMATION SERVICES FOR LARGE ACCOUNTS

Observations (cont.)

- **Sopra Steria** reported €4.4 billion in revenue in 2019. It operates in 25 countries with 46,000 employees. In France, it generates €1.8 billion in revenue and employs more than 19,000 people. Its portfolio comprises consulting, technology services, systems integration, software, business process services, cybersecurity and infrastructure management. Sopra Steria expertise in supporting governments and highly regulated companies enables it to guide clients in building cloud solutions that protect data confidentiality and privacy.
- The Rising Star **HCL Technologies** (HCL) is a $9.9 billion company with more than 150,000 employees (called "ideapreneurs") working in 46 countries. In Europe, HCL has 12,000 employees. It acquired Volvo IT in 2016 and H&D International Group in 2018. In France, the company has more than 330 people in Lyon, Toulouse, and Paris. HCL has been developing robust tools and AI knowledge in recent years, which has enabled it to elevate its portfolio attractiveness and increase its market presence.

ORANGE BUSINESS SERVICES

Overview

Orange Business Services is the global enterprise division of the Orange Group. With 27,000 employees, Orange Business Services supports clients in their digital transformation. The service division reported a €7.8 billion revenue in 2019, serving 3,000 multinational enterprises in 200 countries. In 2018, it acquired Basefarm and its subsidiary, The Unbelievable Machine Company, to strengthen its capacity in Europe. Orange has more than 2,400 cloud experts.

Strengths

Co-innovation focus: Orange helps clients develop new ways of working. It goes beyond refactoring legacy applications to run in the cloud. Orange enables clients to experiment with 5G, IoT, data analytics, artificial intelligence and many other leading technologies. Clients are guided to rethink their business possibilities while reducing costs in the cloud and improving business outcomes through innovation. Orange has more than 3,900 AI, data and digital experts to support clients in reinventing their businesses.

Security and compliance: The company helps clients understand how to best exploit the cloud while keeping their business secure and compliant. The company's experience in doing business in France adds to its capacity to guide clients in their cloud journey. Orange's cybersecurity organization covers all aspects of business risk and compliance, including industrial IoT (IIoT) and operations technology (OT) security.

Influence and capacity: Orange participates in industry associations, including the GAIA-X initiative. Orange's research publications influence governments and corporations. In addition, it has a robust delivery capacity in France to support large-scale transformations. Clients can count on a solid, countrywide service organization. Orange's global presence is of special interest to France-based companies that have operations abroad.

Caution

Orange Business Services is investing in obtaining more public cloud service certifications. However, it has not achieved the highest accreditations from AWS, Microsoft and Google.

2020 ISG Provider Lens™ Leader

Orange Business Services provides a secure path to the public cloud, enabling large enterprises to embrace vigorous digital transformations.

Methodology

METHODOLOGY

The research study "ISG Provider Lens™ Public Cloud – Solutions & Services 2020" analyzes the relevant software vendors/service providers in France, based on a multi-phased research and analysis process. It positions these providers based on the ISG Research methodology. The study was divided into the following steps:

1. Definition of the Public Cloud – Solutions & Services market..
2. Use of questionnaire-based surveys of service providers/vendors across all trend topics.
3. Interactive discussions with service providers/vendors on capabilities and use cases.
4. Leverage 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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Prakash N is a senior analyst at ISG and is responsible for supporting ISG Provider Lens™ studies on Private/Hybrid Cloud, Public Cloud, and Cloud Native - Container Services. His areas of expertise are cloud, data center, public cloud platforms, and cloud native services. During his tenure, he has developed research content for ISG Provider Lens™ in the areas of Private Cloud, Cloud Native Services, and Public Cloud. He is responsible for supporting research, authoring blogs, enterprise content, and the global summary report with market trends and insights.

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