ISG Provider Lens™

Public Cloud – Services & Solutions

Managed Public Cloud 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

Information Services Group Inc. is solely responsible for the content of this report. Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by, and are the sole property of Information Services Group Inc.

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.

The lead author for this report is Pedro L. Bicudo Maschio. The editors are Grant Gross and Ipshita Sengupta. The research analyst is Katharina Kummer and the data analyst is Vijaykumar Goud.

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

For more information about our studies, please email ISGLens@isg-one.com, call +49 (0) 561-50697537, or visit ISG Provider Lens™ under ISG Provider Lens™.

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +49 (0) 561-50697537 or visit research.isg-one.com.

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.

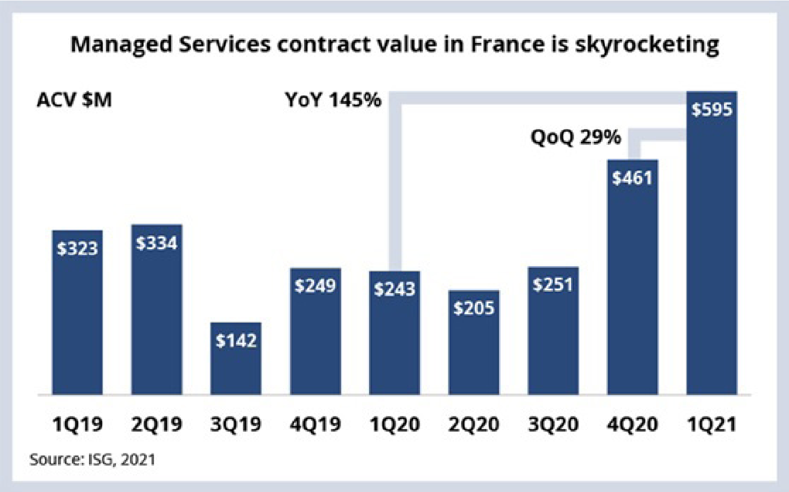
Cloud at the center – The French Government has mandated that any new digital project within the state will use the cloud. This is an extremely important commitment because of the government's spent impact on France's GDP. It also frees government agencies, para-public highly regulated companies to consider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

Managed Public Cloud Services for Midmarket

This quadrant is relevant to large enterprises in France that are evaluating public cloud managed service providers. This quadrant report is centered around the current market positioning of these providers and how they interact with key challenges in large enterprises' infrastructure management in the public cloud environment. These providers manage client workloads on third-party, public cloud, hyperscale environments so enterprises can focus on other tasks.

Enterprises are looking for service providers that are proficient in re-architecting and re-platforming of existing applications. In 2021, the acceleration of cloud usage due to remote work and government services going online creates a demand for public cloud managed services that provide cloud-native solutions, leveraging open-source solutions, containerization and serverless functions. In addition to modernization, this is driven by the urge to achieve cost efficiency. Cost efficiency usually means implementing a multicloud environment, which in turn needs cloud agnostic solutions to be managed at the highest transparency level.

In France, the implementation of cloud-native concepts, automation and improving e-commerce capabilities in connection with saving costs is a noticeable change in an effort to better leverage available resources. This refreshed the market offerings, gave the opportunity for service providers to specialize in specific verticals and encouraged innovative pricing models.

Midsize enterprises benefitted from the diverse number of managed service providers, which are drivers for vertical specialized automation, infrastructure monitoring and cost-efficient multicloud solutions, while offering transparency and data leveraging by implementing tailored dashboards.

IT leaders should read this report to better understand the relative strengths and weaknesses of managed service providers, as well as how managed service provider approaches to the market can impact enterprise public cloud strategies, improve business agility and reduce total cost of ownership.

Software development and technology leaders should read this report to understand the positioning of managed service providers and learn how their offerings can impact ongoing development of enterprise software products.

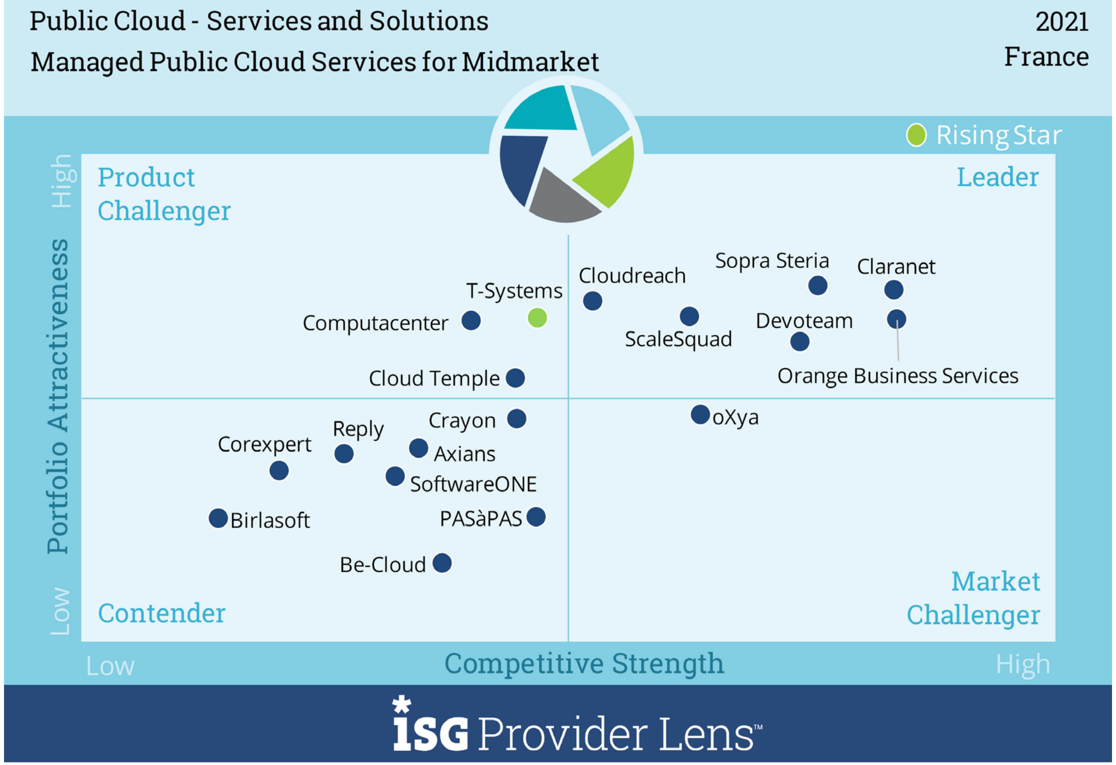
Sourcing, procurement, and vendor management professionals should read this report to develop a better sense of the current landscape of managed services providers in France.

MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Definition

This quadrant assesses service providers and service integrators that offer managed public cloud infrastructure and application services. Managed service providers of public cloud offer professional and managed services on top of public cloud IaaS providers/hyperscalers (AWS, Microsoft Azure, Google Cloud Platform) through a DevOps- and DevSecOps-centric approach and help enterprise build a robust CI/CD pipeline with strong container management capabilities. Under the managed public cloud services umbrella, a provider is responsible for providing site reliability engineering and business resiliency.

Broadly, these services include cloud services lifecycle management, real-time and predictive analysis, and monitoring and managing a customer's public and multicloud environment, with the aim to maximize the performance of workloads in the cloud, reduce costs and ensure compliance and security. Typically, specially developed or licensed cloud management platforms and tools are used to serve customers with



Source: ISG Research 2021

MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Definition (cont.)

maximum automation, and provide the necessary transparency on the managed cloud resource pool, in terms of capacity utilization and costs, including self-service administration. In addition to the technical services a provider offers dashboards to analyze and forecast financial impacts and propose optimization of the services.

Provider services typically include the following:

- Professional services for the management and monitoring of CPU, storage, memory, databases, and operating systems as standalone or micro services or virtual machine and container services;
- Operating system, middleware and application upgrade services;
- Cloud infrastructure management platform for cloud-cost management (charge back and show back), identity management and IT service management;
- Monitoring, logging, patching, and predictive analytics services to guarantee performance and security improvements throughout a container lifecycle to enable continuous integration and delivery;
- Governance and compliance management, along with a robust cyber security framework and platform for securing client data in multiple geographies;
- Support services such as incident management, configuration, security services and automation setup.

MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Eligibility Criteria

- Operational excellence and well-defined professional services;
- Experience in building and managing public and multicloud environments, along with expertise in managing configurations of platforms and systems as well as that of containers;
- Financial dashboards and cost analysis tools, providing visibility of variable costs associated with cloud providers through FinOps ecosystem;
- Support for software code development and cloud-native and legacy system integration by leveraging DevOps, API-enabled automation and cloud analytics services;
- Robust cyber security managed services offering;
- Partnerships with relevant public cloud providers and respective managed-service-provider certificates for AWS, Microsoft Azure, Google Cloud Platform, or others.

Observations

Midmarket clients often need service providers to also support them in decisions around cloud configuration, security, data lakes and analytics, DevOps automation and cost optimization. These services can be included in managed services or provided on-demand.

A widespread adoption of AIOps is diminishing service providers' differentiation in terms of technology. In the midmarket, key differentiators are related to the capacity to respond quickly to on-demand service requests, and the quality or technical expertise a service provider can offer.

The cost management and cloud resource consumption control are also important. Service providers include FinOps tools in their managed service offering, enabling clients to check their multicloud spend and proactively optimize consumption to contain costs. Midmarket clients often require their service provider to assess options to reduce costs.

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

- **Claranet** partners with the top three hyperscalers, with high certifications. Its managed services include cloud operations, data management and security monitoring. Optionally, clients can include cybersecurity and data analytics in their contracts.

MANAGED PUBLIC CLOUD SERVICES FOR MIDMARKET

Observations (cont.)

- **Cloudreach** partners with the top three hyperscalers and leverages their toolsets to offer managed services. It differentiates itself by the number and level of cloud certifications it possesses. Cloudreach focuses on best practices to provide full compliance and security.
- **Devoteam** has separate business units for AWS, Google Cloud Platform and Microsoft Azure. Dedicated teams enable it to offer deep expertise related to each hyperscaler's portfolio. The Devoteam G Cloud (Google Cloud Platform) is one of the most relevant in Europe.
- **Orange Business Services** leverages a large organization to provide midmarket clients with the seamless quality and efficiency it offers to large accounts. The company partners with the top three hyperscalers and leverages its Orange Flexible Engine Cloud platform, if necessary.
- **Scale Squad** is a part of the NEURONES Group. The company focuses on the midmarket. It offers a flexible and Agile organization to respond quickly to clients' needs. It takes a pragmatic approach, with automation tools and frameworks to deliver quality services.
- **Sopra Steria** operates across France to serve large and midmarket clients. It has a robust managed services platform with AIOps and FinOPs full functionality. It partners with six hyperscalers and local data centers, offering clients with many alternatives to optimize cost and performance.
- **T-Systems** (Rising Star) is a Germany-based service provider and a well-known brand in France. A few years ago, it moved from being a data center provider to being recognized as a top certified cloud partner. It partners with the top three hyperscalers, globally. In Europe, it also offers OVHcloud and Open Telekom Cloud.

ORANGE BUSINESS SERVICES

Overview

Orange Business Services 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 is an AWS Advanced Consulting and MSP partner, Microsoft Azure partner and Azure Networking MSP, Google Cloud Platform Premier Partner and MSP, and an OVHcloud partner.

Strengths

Advanced monitoring: Orange makes extensive use of automation to classify incidents, foster self-heal and self-services and optimize AI-powered service dashboards. Its monitoring toolset includes SolarWinds, LiveAction, ThousandEyes and Aternity. Orange tracks user experience, application performance, network performance and infrastructure data, all integrated for a robust ITSM solution.

Fabric approach for quality: Orange services are based on a customer catalog or a self-service IT catalog, with automated self-service workflows for service requests and dashboards for tracking and visibility. Its smart service desk provides AIOps, FinOps and DataOps functionalities that can integrate with network operations center (NOC) and SOC services. Orange's DevOps services integrate with clients' agile sprints. It has site reliability engineers and tools to help clients improve their IT service quality and business outcomes.

Superior delivery capacity: Orange has a large-scale service organization to support midmarket clients. Its multiple end-to-end cloud-based services include connectivity, cybersecurity, managed services, data services and AI analytics, with more than 2,400 cloud practitioners and 3,900 experts in AI, data and digital services. Orange implements and operates clients' solutions to ensure the highest security standards, confidentiality and compliance with regulatory requirements such as GDPR and assure data sovereignty.

Caution

Orange has more certifications from Microsoft. The company should continue improving its certification levels to achieve top accreditations within AWS and Google Cloud Platform.

2021 ISG Provider Lens™ Leader

Orange offers a comprehensive portfolio for clients willing to accelerate the ROI in their digital transformation initiatives.

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

Pedro Luís Bicudo Maschio, Author

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.

Katharina Kummer, Enterprise Context and Global Overview Analyst

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.

Authors and Editors

Jan Erik Aase, Editor

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.

ISG Provider Lens™ | Quadrant Report
December 2021

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including more than 75 of world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.