iSG Provider Lens™

Public Cloud – Solutions & Services

Managed Public Cloud 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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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.

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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.

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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.
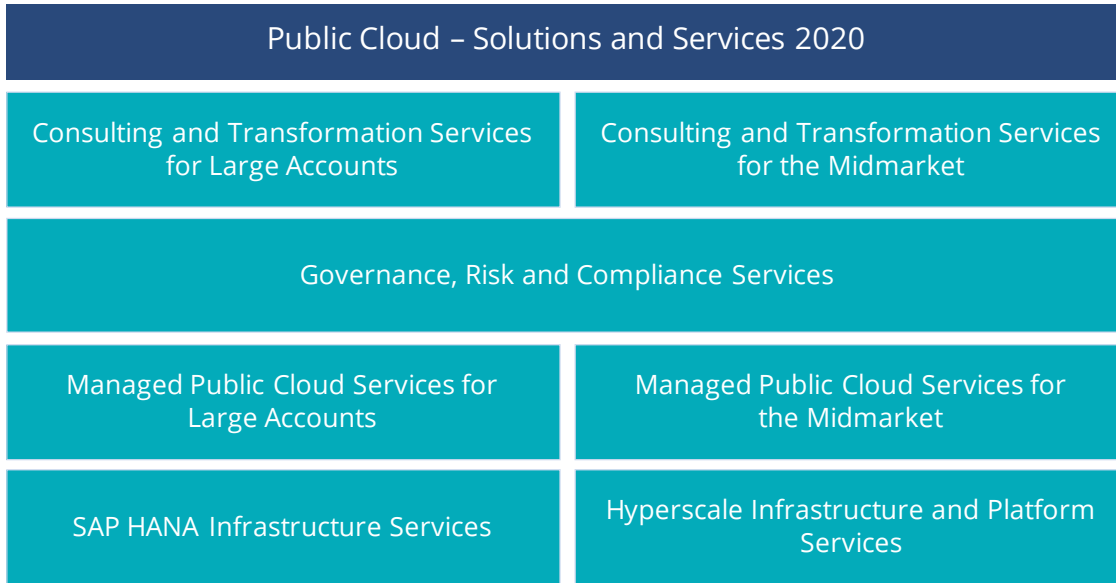
According to the announcement, "the creation of digital ecosystems requires building trust and interoperability across all cloud users and providers." However, the hyperscalers have already built their ecosystems in Europe, including hundreds of local service providers that sell, install, and manage 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

Public Cloud – Solutions and Services 2020

Consulting and Transformation Services for Large Accounts	Consulting and Transformation Services for the Midmarket

Governance, Risk and Compliance Services

Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for the Midmarket

SAP HANA Infrastructure Services	Hyperscale Infrastructure and Platform Services

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 cover- age 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.

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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

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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

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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

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Public Cloud – Solutions & Services Quadrants

ENTERPRISE CONTEXT

Managed Public Cloud Services – Large Accounts

This quadrant is relevant to large enterprises in France that are evaluating public cloud managed service providers (MSPs). In this quadrant report, ISG lays out the current market positioning of these providers in France and how they can address key challenges in large enterprises' infrastructure management in the public cloud environment. MSPs manage client workloads on third-party, public cloud, hyperscale environments so enterprises can focus on core business.

To be successful in the current digital business environment, enterprises must take a unified approach to their technical infrastructure across public and private clouds. Data residency and management are key considerations in an enterprise's transformation journey. Using public cloud managed services can help them implement cloud-native solutions leveraging containers and serverless functions with single-touch DevOps integration. This helps enterprises achieve application modernization and cost optimization to run their applications at scale.

Enterprises will get the benefit of the MSPs' automation and AI capabilities to monitor their infrastructure to predict the failures and dependency of services in case of failures to reduce maintenance costs.

ISG sees that enterprises in France are engaging in discussions around cloud transformation from private cloud to public cloud. Managed service providers can help by providing advisory services around regulations and risks associated with public cloud services and contractual terms and by managing their cloud infrastructure. They also can help by providing public cloud tools that are essential to scaling agile development.

IT leaders should read this report to better understand the relative strengths and weaknesses of managed service providers, as well as how the MSPs' 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 MSP offerings can impact the ongoing development of an enterprise's software products.

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

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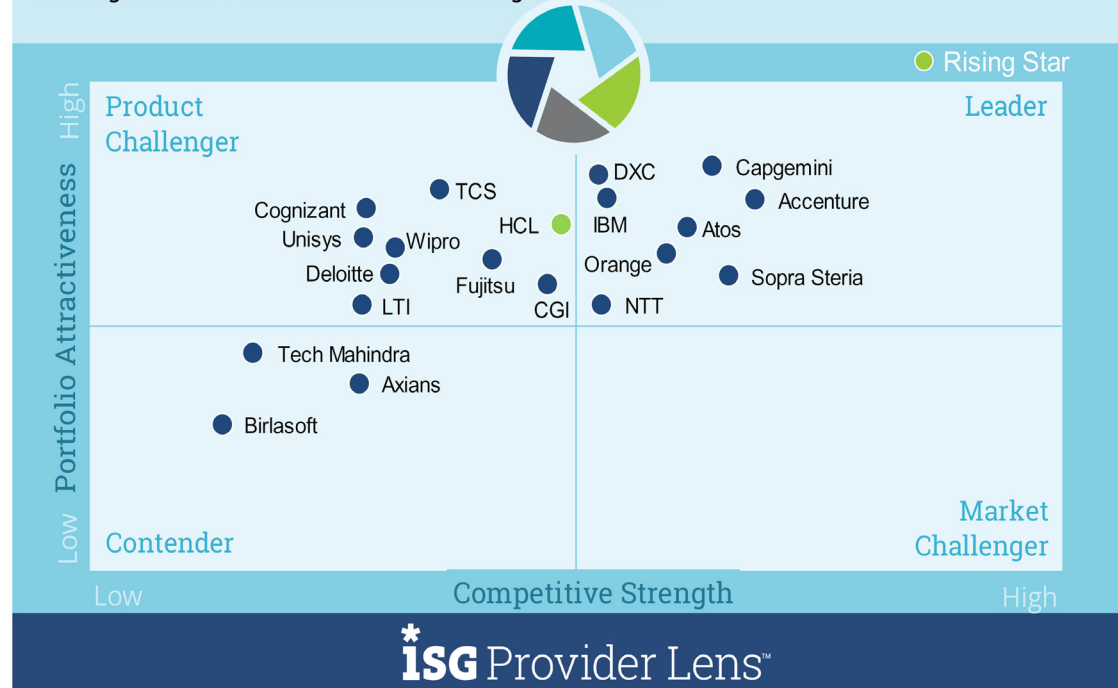
MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Definition

Public cloud managed services providers (MSPs) offer professional and managed services atop third-party public cloud IaaS and PaaS hyperscale platforms. Broadly, these services include provisioning, real-time and predictive analysis, and monitoring and operational management of a customer's public and multi-cloud 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 maximum automation and provide the necessary transparency on the managed cloud resource pool in terms of capacity utilization and costs, including self-service administration.

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.

Source: ISG Research 2020

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MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Definition (cont.)

Services provided typically include:

- Management and monitoring services around CPU, storage, memory, databases, and operations of microservices, virtual machines and containers.

- Operation system, middleware and application upgrade services.

- Service portal for expense management (chargeback and showback) and identity management or IT service management.

- Governance and compliance management.

- Support services such as incident management, configuration, security services and automation setup.

Eligibility Criteria

- Operational excellence and well-defined professional services.

- Experience in building and managing public and multi-cloud environments.

- Expertise in managing configurations of platforms and systems as well as containers.

- Support for software code development and for cloud-native and legacy system integration.

- DevOps, API-enabled automation and cloud analytics experience.

- Mature security processes.

- Support for different client roles such as IT technicians and developers.

- Partnerships with relevant public cloud providers and managed service provider (MSP) certificates for AWS, Azure, GCP or others.

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Observations (cont.)

The large account market in France had been slower in embracing the public cloud than in other countries. The COVID-19 pandemic uncovered several aspects of business resilience. Corporations had to adapt quickly to an abrupt market change. Public cloud service partners responded to enterprises' demand for fast deployment of additional connections and rapid scaling of resources to enable their employees to work from home.

After adapting to market change, client companies learned that the cloud can provide security, scalability and an alternative to business resilience. In addition, some corporations discovered that their legacy data centers did not have the technology to enable their operators to work from home. One large service provider explained that it had to keep 15 percent of the provider's staff commuting to client data centers to keep systems running.

The market disruption experienced in 2020 will stay in people's memories for decades. However, no matter how hard the market pushes cloud adoption, the service volumes in France are far from

reaching market saturation. Perhaps decades will be necessary to fill the market gap.

For companies operating in the cloud, the first observation is that few have migrated everything to the cloud. Most service providers describe large accounts that are gradually moving, one system (workload) after the other, in a paced move rather than in a big-bang approach. In France, as well as other countries, leading enterprises are now moving their core applications to the cloud.

When it comes to diversity of providers, this study finds Indian service companies struggling to grow in France. French companies are dominant in terms of market share and in terms of the number of Leaders. 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. The difference is more related to culture and the local presence to build commercial relationships. Except for Accenture and IBM, the foreign companies have a small number of offices in France.

For clients already operating in the cloud, there is an increasing demand for application modernization and the support of cloud-native applications. In both cases, clients demand automation of their continuous integration and delivery work, usually called CI/CD pipelines. Although public cloud providers offer automation tools, those are not integrated with clients' application development tools. Service providers enable that integration, guiding clients on CI/

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Observations (cont.)

CD best practices, and add automation that can be triggered from command lines from the client's application development workstations.

DevOps automation to enable CI/CD pipeline automation was a hot topic last year and continues in high demand. Agile practices are growing even faster than cloud services, pushed by digital businesses. However, clients find it difficult to scale automation themselves. Fast and reliable CI/CD pipelines are easier to build in the cloud. AWS, Microsoft and Google provide pay-per-use tools, while service providers add automation and cost control tools to help clients in governing their Agile development teams.

CI/CD automation also pushes container utilization, which raises concerns around security, expanding the cloud services scope. In the end, complexity is on the rise, creating new opportunities for service providers.

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. AIOps is rapidly becoming commonplace.

Of the 50 providers assessed by this study, 19 have been qualified for this quadrant. Eight are Leaders and one is a Rising Star.

- **Accenture** reported $43 billion in revenue in fiscal 2019, with more than 506,000 employees in 51 countries. The company 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. The firm has more than 59,000 certified cloud experts, who support over 3,000 clients in 49 countries. Accenture has more than 7,000 employees in Lyon, Nantes, Paris, Sophia Antipolis and Toulouse. It provides superior automation and scale to handle large, multinational clients. Its robust service platform offers seamless user experience in all the countries in which it operates.

- **Atos** provides digital transformation with 110,000 employees in 73 countries and has annual revenue of €12 billion, including €1.8 billion in revenue and 12,000 employees in France. Acquisitions in 2020 include U.S.-based cloud and technology consulting firm Maven Wave, as well as Alia Consulting, EcoAct, digital.security, Paladion and Miner & Kasch. Atos is an AWS

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Observations (cont.)

Advanced Consulting Partner and MSP, Microsoft Azure Expert MSP and Google Premier Partner with a strategic partnership to co-invest in AI development labs and quantum computing. Atos leverages its robust service platform and large footprint in France to provide large enterprises with many options to exploit the benefits the cloud can offer.

■ **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. Capgemini Cloud Platform (CCP) is at the core of the company's cloud offerings. The company's investments in renovating its service tools have paid off, providing Capgemini with advanced management and operations platforms. Capgemini has top accreditations from AWS, Microsoft Azure and Google Cloud Platform, with many certificates. It also partners with IBM Cloud, Oracle Cloud and OVHcloud to serve clients that have special requirements.

■ **DXC Technology** is a global company with $19.6 billion in 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. The company has long been providing managed services, a heritage from CSC and HPE/EDS, companies that provided a business platform for DXC. It has 3,000 employees across two centers of excellence in Toulouse and a digital center in Paris. Its market presence helps the company keep growing.

■ **IBM** reported $77 billion in revenue in 2019, with more than 350,000 employees in over 175 countries. It has 19 sites in France, including the IBM Global Industry Solution Center Nice-Paris and IBM Client Centers in Montpellier and in Bois-Colombes. The company offers IBM Cloud and partners with AWS, Google and Microsoft to provide consistent managed services across hybrid and multi-cloud environments in service consumption models. IBM Multicloud Management Platform (MCMP) is a full-featured digital consumption and delivery platform with integration and orchestration layers that support multiple technology stacks across many vendors. IBM can integrate other tools to provide a comprehensive, as-a-service IT management platform.

■ **NTT Ltd.** was recently formed by bringing together 40,000 people from 28 companies, including NTT Communications, Dimension Data, CAPSiDE and NTT Security. CAPSiDE adds cloud man-

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Observations (cont.)

agement tools and expertise. The company has more than 10,000 clients in over 200 countries. It operates in four locations in France. NTT Managed Cloud Infrastructure Services provide monitoring, reporting, and management of compute, storage, network components, PaaS and SaaS in AWS, Microsoft Azure and Azure Stack. NTT offers a catalog-based service for efficient cost and consumption control. It provides access management, hardening integrated with customer policies, hybrid cloud connectivity and CI/CD automation.

- **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 The Unbelievable Machine Company in Europe. Orange provides multiple cloud-based services including connectivity, cybersecurity, managed services, data services and AI analytics with more than 2,400 cloud experts and 3,900 AI, data and digital experts. It provides

robust managed services that it supplements with application management, security, data management, 5G and IoT to accelerate its clients' digital transformation.

- **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. It acquired BLUECARAT in 2018, and cxpartners and Sodifrance in 2020. Sopra Steria has a robust service delivery organization in France to support large accounts in their local and global operations. The company can deploy workloads in different clouds according to the requirements for best performance, security and compliance.

- 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 acquired Volvo IT in 2016 and H&D International Group in 2018. In France, the company has been investing in two data centers and a delivery center in Lyon since 2009. It employs more than 330 people in Lyon, Toulouse, and Paris. HCL's full-featured platform (MyCloud) comprises a self-service portal with a service catalog for automated provisioning, service scheduling automation, finance/cost control (FinOps), AI-powered optimization assessments, REST APIs and CLI for infrastructure as code and integration, role-based access control (RBAC) privilege access management and workflow automation.

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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 provides multiple cloud-based services including connectivity, cybersecurity, managed services, data services and AI analytics with more than 2,400 cloud experts and 3,900 AI, data and digital experts.

Strengths

Focus on value-added services: Orange has committed to AWS, Microsoft and Google to joint-develop the public cloud market in Europe. It is strengthening its partnerships to enable the co-development of value-added services. In 2020, it announced a new partnership where Orange plans to build a next-generation data analytics and machine-learning platform with Google technologies. Orange already has a differentiated program around data and analytics. The company goes beyond managed services to offer continuous innovation to client companies.

Integrated automation platform: Orange has adopted AIOps and standardized on both Moogsoft and ELK (Elastic) to deliver a single pane of glass that integrates public cloud services, networking services and security services (AIOps, SOC and NOC). Orange can monitor an application's end-to-end performance to provide a better user experience. Clients find in Orange Business Services a partner that cares for their application performance and security.

Application operations: Managed Applications is a service designed to improve a client's operational capabilities. With a service catalog comprising more than 50 supported products such as databases, web servers and file systems, Orange builds an application platform to host efficient application development with DevOps, security, application performance monitoring and optimization.

Caution

Orange Business Services has been building a robust portfolio. However, it has not acquired top-level cloud certifications. The company is not a cloud-native competitor; its portfolio includes Orange's data center services. With 2,400 cloud experts, the company has a reasonable size in Europe, but still lags in global headcount when compared to some of its competitors.

2020 ISG Provider Lens™ Leader

Orange Business Services supplements managed services with application management, security, data management, 5G and IoT to accelerate its clients' digital transformation.

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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