ISG Provider Lens™

Public Cloud - Solutions and Services

Managed Public Cloud Services for Large Accounts

A research report comparing provider strengths, challenges and competitive differentiators

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Executive Summary

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A year improving the maturity of the French market

Compared with last year, enterprises in France are taking more time to assess and engage cloud partners. Companies show a better understanding of the benefits the cloud and the impact it has on business competitiveness. Enterprises, therefore, are cautious, making the best choice, indicating market maturity after the cloud rush observed in 2020 and 2021.

The French government's strategy defined in 2021 for cloud de confiance (trusted cloud) and cloud au centre (cloud at the center) is in effect, and the Agence Nationale de la Sécurité des Systèmes d'Information (ANSSI) has issued two SecNumCloud visas. These certificates ensure data residency in Europe and the effectiveness of data loss prevention tools. Although discussions on true data sovereignty are underway and have been evolving, no comprehensive solution to comply with data residency laws for companies that operate outside the eurozone is currently available.

Enterprises continue with their cloud functions despite the presence of regulations. Health Data Hub (HDH) is a public interest group (GIP) created in 2019 to support the Système National des Données de Santé (National Health Data System or SNDS). HDH centralizes health data generated in France, on Microsoft Azure, which ensures that data remains within the country, is encrypted and protected with advanced data loss prevention tools. However, Microsoft is bound by the U.S. Cloud Act, which implies that the U.S. government can mandate that Microsoft shut down a client

Stronger focus on **multi-cloud expenditures**

access to Azure, which would prevent the French government from accessing citizens' health data.

From regulators' point of view, HDH and other companies in the same situation should simply move their data to a SecNumCloud-certified data center. However, enterprises need the advanced cloud tools the American hyperscalers offer to manipulate the data sets – to extract, convert, change, query and organize data with AI technologies – added by data access control and data loss prevention tools. These advanced, cloud-native tools are not offered by most competitors. The cost to develop, test and certify cloud-native technologies can be enormous, thus accessible to hyperscalers but not the local service providers; the financial strength of AWS, Microsoft or Google cannot be compared with that of local, France-based organizations. Market leaders are forming partnerships

to overcome the sovereignty challenge — T-Systems and Google Cloud, OVHcloud and Google Anthos, Thales and Google, and Bleu (the Capgemini, Orange and Microsoft partnership). ISG expects these announcements to show results in 2024.

The job market in France has also been impacted by the growth in cloud demand. For enterprise clients, it is a challenge to meet the demand for qualified professionals by providing attractive salaries. Most service providers surveyed describe hiring and retaining talent as a challenge. They are partnering with academia and offering training and certification programs to develop new talent. For example, AWS has trained more than 100,000 people in France since 2017. ISG global research shows that the number of cloud-certified professionals is doubling every year.

Trends in the Consulting And Transformation Services quadrants indicate that an increasing number of enterprises are adopting cloud-native technologies to improve business value. ISG notes a relatively small number of companies are adopting a lift-and-shift approach, with the majority of migrations assessing application modernization options. Clients expect providers to develop and manage a robust business case that includes infrastructure as code (IaC), serverless computing, APIs, microservices, analytics and broad use of automation. At the same time, clients expect providers to help in developing the required culture and skills, ensuring compliance and security at scale, and pushing new governance models to handle the consequent complexity.

In the **large accounts market**, sophisticated cloud readiness assessments are giving way to automated tools, including tools for data extraction from legacy databases to load into cloud-native, as-a-service databases. These automation tools complement the migration frameworks offered by hyperscalers to enable large workloads with hundreds of servers and many terabytes of data to migrate in short cycles, thereby reducing the impact on normal business operations.

A series of mergers and acquisitions in the last two years have reduced the number of certified partners that focus on the **midmarket** in France. Many local service providers have not qualified for inclusion in this study. However, the providers that have a clear focus on the midmarket have reported record growth. A typical midmarket client understands that liaising with a certified service provider is the best

way to access the support of top experts for cloud services, including automation, data analytics and AI.

Trends in the Managed Public Cloud Services quadrant include a stronger focus on controlling multi-cloud expenditures. ISG global research shows that one third of enterprises have one cloud, another one third have two clouds and the remaining enterprises use three or more clouds. A similar trend is visible in France. Clients can use one cloud for core applications, another for collaboration and other clouds with copies to ensure data residency, sovereignty, compliance and disaster recovery.

Large accounts demand governance tools to manage access rights, spending rights, cost accounting and budget spending. In this market segment, service providers have been improving their AIOps, offering self-service catalogs with automated workflows that verify approval,

authority, access and log users' activity. Advanced tools ensure cloud asset configurations comply with company policies. FinOps tools integrate the usage on all cloud platforms to consolidate spending and reporting. Advanced FinOps include AI algorithms that can predict spending to generate alerts or prevent overspending, thus keeping a budget compliant to enterprise rules. The level of sophistication that AIOps and FinOps tools have achieved is notable. However, these advanced functions are not available on commercial tools. Leading service providers have proprietary tools to complement and orchestrate commercial tools, and clients should assess their providers accordingly.

Managed service providers addressing the **midmarket** offer AIOps and FinOps functionalities with less sophistication around governance and compliance because a typical midmarket client is

primarily focused on costs and spending. For this market segment, advanced service providers use AI algorithms that monitor usage patterns to offer insights for optimization. The leading providers offer cloud architecture advice to explore consolidation and upgrades that promote performance and cost savings, which, in many cases, means the extended use of serverless IaC, data lakes and other cloud services that eliminate or reduce server utilization hours and the database size.

The Hyperscale Infrastructure and Platform Services quadrant assesses the 12 hyperscalers that have operations in France — which is two more than last year. The increasing importance of cloud sovereignty is attracting new players. ISG expects to find more new players next year. However, the market in France is dominated by American hyperscalers because of the rich portfolios they offer. For the reason, ISG expects

more partnerships to be established in the future to better balance client requirements and government concerns.

This market is characterized by players competing for new clients and new workloads. ISG has found only a few cases of clients migrating from one hyperscaler to another. The hyperscalers have adapted their offerings to the multi-cloud reality.

The **SAP HANA Infrastructure Services** quadrant shows contended growth in France. However, for new clients willing to run SAP products, cloud is the only option. SAP no longer offers perpetual licenses for on-premises deployments or for existing clients; it offers attractive deals to push cloud adoption.

Executive Summary

RISE with SAP, or simply SAP RISE, is an SAP program to accelerate clients' migration to the cloud. It bundles pay-per-user SAP S/4HANA licenses and cloud infrastructure that looks like a SaaS model. Clients can choose their preferred cloud, where SAP acts as a managed service provider.

Leaders in this market offer automation to assess, plan and migrate SAP to the cloud, including legacy ECC systems, data warehouses, documents and files. It is not a simple process, and automation can reduce migration cost and time.

Providers offer cloud architecture advice to optimize cloud use.

Provider Positioning

	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
3DS OUTSCALE	Not In	Not In	Not In	Not In	Contender	Not In
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	Contender	Not In	Contender	Not In	Not In	Not In
Bechtle	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
Be-Cloud	Not In	Contender	Not In	Contender	Not In	Not In
BSO	Not In	Contender	Not In	Product Challenger	Not In	Not In
Capgemini	Leader	Not In	Leader	Not In	Not In	Not In

Provider Positioning

	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
CGI	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Claranet	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	Not In	Not In	Not In
Corexpert	Not In	Contender	Not In	Contender	Not In	Not In
Crayon	Not In	Contender	Not In	Contender	Not In	Not In
Devoteam	Not In	Leader	Not In	Leader	Not In	Not In
DoiT	Not In	Contender	Not In	Contender	Not In	Not In
DXC Technology	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Ecritel	Not In	Contender	Not In	Contender	Not In	Not In

Provider Positioning

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	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
Fujitsu	Contender	Not In	Contender	Not In	Not In	Not In
GlobalLogic	Contender	Not In	Not In	Not In	Not In	Not In
Google	Not In	Not In	Not In	Not In	Market Challenger	Market Challenger
HCLTech	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
IBM	Leader	Not In	Not In	Not In	Product Challenger	Product Challenger
Infosys	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
IONOS	Not In	Not In	Not In	Not In	Contender	Not In
Kyndryl	Not In	Not In	Leader	Not In	Not In	Not In
LTI	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Microsoft	Not In	Not In	Not In	Not In	Leader	Leader

Provider Positioning

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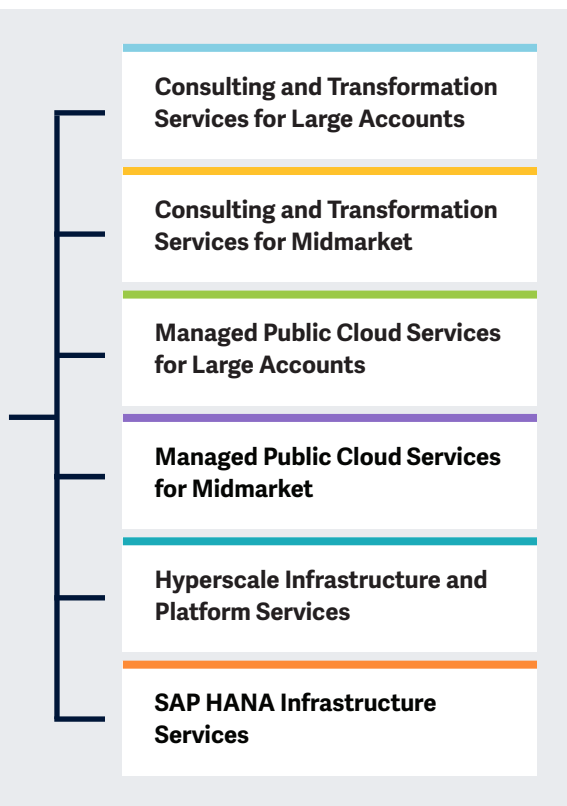|	Consulting and Transformation Services for Large Accounts	Consulting and Transformation Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
NTT Ltd.	Contender	Not In	Contender	Not In	Not In	Not In
Open Telekom Cloud	Not In	Not In	Not In	Not In	Contender	Not In
Oracle	Not In	Not In	Not In	Not In	Market Challenger	Not In
Orange Business Services	Leader	Leader	Leader	Leader	Product Challenger	Contender
OVHcloud	Not In	Not In	Not In	Not In	Rising Star ★	Contender
oXya	Not In	Leader	Not In	Leader	Not In	Contender
PASàPAS	Not In	Market Challenger	Not In	Contender	Not In	Not In
Reply	Not In	Product Challenger	Not In	Contender	Not In	Not In
SAP	Not In	Not In	Not In	Not In	Not In	Product Challenger
ScaleSquad	Not In	Leader	Not In	Leader	Not In	Not In

Provider Positioning

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	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
Scaleway	Not In	Not In	Not In	Not In	Product Challenger	Not In
SCC	Not In	Contender	Not In	Product Challenger	Not In	Not In
SoftwareONE	Not In	Market Challenger	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	Rising Star ★	Not In	Leader	Not In	Not In	Not In
Tech Mahindra	Contender	Not In	Contender	Not In	Not In	Not In
T-Systems	Product Challenger	Product Challenger	Not In	Product Challenger	Not In	Contender
Unisys	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Wipro	Leader	Not In	Leader	Not In	Not In	Not In

This study focuses on what ISG perceives as most critical in 2022 for **Public Cloud – Solutions & Services**

Simplified Illustration Source: ISG 2022

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

Definition

With the pandemic transition to the endemic stage, enterprises are rapidly increasing their investments in digital transformation engagements, which is leading to an exponential rise in public cloud adoption. Other key reasons for this move are a higher emphasis on cybersecurity, a greater push towards IT cost optimization and operational efficiency, and increased deployment of automation tools for data management. The growing maturity of public cloud infrastructure providers has had a major impact on both enterprises and IT service providers, with both witnessing a significant shift in sourcing services, from physical hardware to digital applications and platforms.

For enterprises, this has also impacted business models that require digital initiatives and aim to address governance,

risk and compliance norms. Given the widespread adoption of the as-a-service model, enterprises should continuously evaluate cloud service providers on a global level mainly due to growing security concerns and the dynamic nature of the business landscape. They continue to seek providers that can act as strategic partners in carrying out cloud transformation engagements on major hyperscalers – AWS, Microsoft Azure and Google Cloud Platform (GCP). These providers will continue to manage workloads on an ongoing basis and help enterprises control, optimize and manage cloud expenses though frameworks such as FinOps.

ISG reports a strong demand for digital transformation engagements and cloud-based XaaS solutions which, in turn, is driving global contracts for cloud products and services, including infrastructure-as-a-service (IaaS), software-as-a-service

(SaaS) and platform-as-a-service (PaaS). According to the 1Q 2022 ISG Index™ figures, the global market has grown 31 percent in combined market annual contract value (ACV) to reach its current value of $24 billion year over year, while the XaaS ACV has increased by 43 percent to reach $15.6 billion in the same period. The IaaS spending grew by more than 50 percent to reach $11.7 billion, while the SaaS market grew by 22 percent to reach $3.9 billion.

The ISG Provider Lens™ study offers IT decision makers:

- A differentiated positioning of providers based on competitive strengths and portfolio attractiveness

- Focus on different markets, including the U.S., the U.S. public sector, Germany, Switzerland, the U.K., Nordics, Brazil, Australia, France and global geographies

ISG studies serve as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following six quadrants: 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, and SAP HANA Infrastructure Services.

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers

- A differentiated positioning of providers by segments

- Focus on regional market

Our 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 use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of service 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.

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

Provider Classifications: Quadrant Key

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.

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.

★ **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 means 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.

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

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.

Managed Public Cloud Services for Large Accounts

Managed Public Cloud Services for Large Accounts

Who Should Read This

This quadrant is relevant to large enterprises in France that are evaluating public cloud managed service providers (MSPs) in the public cloud environment. In this quadrant report, ISG defines the current market positioning of service providers in France and shows how they address the key challenges faced by large enterprises with their public cloud models. Service providers are managing client workloads on third-party, public cloud and hyperscale environments, enabling enterprises to focus on other tasks.

Enterprises in France are focused on using governance tools to manage access rights, assure data sovereignty and comply with government regulations for effective cloud implementation and management.

Automation-enabled managed services, including AIOps, are gaining traction for the monitoring of cloud infrastructure for proactive responses, resulting in predictions of failure and cost reduction. In order to keep the budget in compliance with enterprise regulations, service providers are focusing on enhancing FinOps offerings that can generate alerts or provide recommended corrections for cloud usage.

In recent times, service providers have started assisting enterprises by providing advisory services around regulations and risks associated with public cloud services, along with a well-defined and structured contractual term to manage cloud infrastructure. Enterprises in France are increasingly looking for application modernization and the support of cloud-native applications to scale agile development.

IT leaders should read this report to better understand the relative strengths and weaknesses of MSPs, as well as how an MSP's approach to the market can impact enterprise public cloud strategies, improve business agility and reduce the TCO.

Software development and technology leaders should read this report to understand the positioning of MSPs and learn how their offerings can impact ongoing development of enterprise software products.
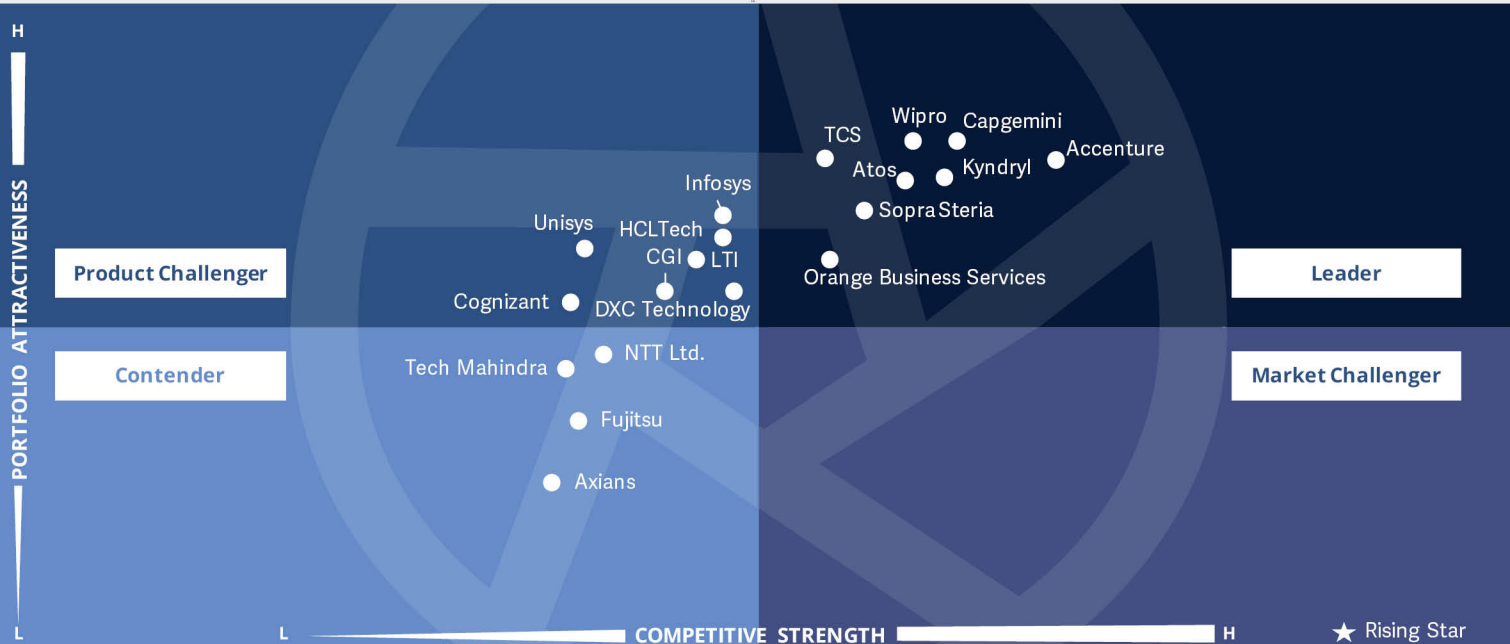
Sourcing, procurement and vendor management professionals should read this report to develop a better sense of the current landscape of MSPs in France.

Managed Public Cloud Services for Large Accounts

Definition

This quadrant assesses service providers and service integrators that offer managed public cloud infrastructure and application services on public cloud infrastructure such as AWS, Microsoft Azure and Google Cloud Platform (GCP). They adopt DevOps and DevSecOps-centric approaches to help enterprises 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 (SRE) and business resiliency.

Broadly, these services include cloud services lifecycle management, real-time and predictive analysis, and monitoring and managing of a customer's public and multi-cloud environments. The aim is to maximize the performance of workloads in the cloud, reduce costs and ensure compliance and security. Typically,

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. In addition to technical services, a provider offers cloud optimization capabilities through the FinOps approach and leverages FinOps frameworks. These are used to analyze and forecast financial impacts plus proposed optimization of cloud resource consumption by bringing in stakeholders from various departments such as engineering or IT, finance, procurement, line of business and executive management.

Provider services typically include the following:

- Professional services for managing and monitoring CPU, storage, memory, databases and operating systems as standalone or microservices, virtual machines and container services

- Automated upgrade services for operating system, middleware and applications on public cloud infrastructure

- Hybrid cloud infrastructure management platform for cloud cost management (chargeback and show back), identity management, FinOps and IT service management

- Monitoring, logging, patching and predictive analytics services to improve performance and security improvements throughout a container lifecycle to enable continuous integration and delivery

- Governance and compliance management, along with a robust cybersecurity 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 Large Accounts

Eligibility Criteria

1. **Operational excellence** and **well-defined** professional services

2. Experience in **building** and **managing** public and Multicloud environments

3. Expertise in **managing configuration** and **integration** of platforms and systems and containers

4. **Financial dashboards** and cost analysis tools, providing visibility of variable costs associated with cloud providers through **FinOps** ecosystem

5. **Support** for software code development and cloud-native and **legacy system** integration by leveraging **DevOps, API-enabled automation** and cloud **analytics** services

6. Robust **cybersecurity** managed services offering

7. **Partnerships** with relevant public cloud providers and respective managed service provider certificates for AWS, Microsoft Azure, GCP or others

Observations

The managed public cloud services market is constantly evolving. In the past, clients were satisfied with monitoring cloud utilization and infrastructure performance. However, service expectations are much more complex today. Large accounts use more than one cloud, after exploring the best services each can offer. They also use a plethora of cloud-native technologies such as AI, machine learning, data lakes, serverless computing, IaC and containers.

An MSP must know each cloud service in detail. AWS, Azure and Google offer more than 600 services combined, requiring hundreds of certifications by MSPs' staff. To address this complexity, top MSPs have developed advanced management platforms that use AI analytics. All MSPs in this quadrant use AIOps tools, but some have better integration and analytics capabilities to support clients' requests.

The complexity of multi-cloud environments raises concerns around utilization, cost and compliance. Enterprises need to manage costs and demonstrate the correct application of their financial resources, including an audit trail for future verification. FinOps tools have emerged to integrate multi-cloud utilization and spending. The top MSPs have built extensions to FinOps tools that are integrated with security, audit and analytic tools to provide rich service dashboards.

From the 50 companies assessed for this study, 19 have qualified for this quadrant, with eight being Leaders.

accenture

Accenture leverages a global service platform that integrates its proprietary automation tools (myNav, myWizard, myConcerto and SynOps) to cover all requirements around AIOps and FinOps. It

has offshore capacity and local expertise from its acquisitions in the last three years.

Atos

Atos offers OneCloud, a comprehensive framework comprising services and tools. It enables full automation with AIOps and FinOps functionalities, integrating cybersecurity, data services and edge computing. It has partnerships with hyperscalers such as OVHcloud and Google, which enables it to manage sovereign clouds with local experts.

Capgemini

Capgemini offers advanced automation that integrates a client's clouds into a comprehensive IT service management platform. The company offers local support and offshore capacity. Top

partnerships with many vendors and hyperscalers enable it to support large accounts worldwide.

Kyndryl

Kyndryl has a robust service organization in France. After becoming independent from IBM, it has reinvented its service platform to incorporate market-leading tools. It also renewed its partnerships with hyperscalers, with a significant increase in the number of cloud certificates.

Orange Business Services

Orange Business Services has been strengthening its partnerships with hyperscalers. It has a large organization in France, with an increasing number of certifications to offer clients with the best qualified experts to support their cloud operations.

Managed Public Cloud Services for Large Accounts

Sopra Steria

Sopra Steria has more than 7,500 cloud experts to support clients in Europe. The company has a massive capacity in comparison with its competitors in France. It offers many options for data location, leveraging a vast partner ecosystem, which enables it to manage secure sovereign clouds.

TCS has improved its cloud portfolio with the creation of dedicated business units for AWS, Azure and Google, which helps it to better support clients. It has been growing as an MSP in all regions, including France. TCS streamlines cloud management by automating everything.

Wipro focuses on automation and a fabric approach that enables it to deliver rapid results to clients. It enables automation on a global-scale service platform. The company blends local and global experts to ensure efficiency, scale of operations and sustainable growth.

Leader

"Orange Business Services' vast portfolio and broad operations support clients' sustainable growth."

Pedro L. Bicudo Maschio

Orange Business Services

Overview

Orange Business Services is a division of the Orange Group. The company offers networking, cybersecurity, customer experience, collaboration and cloud services. In 2022, it consolidated the acquired companies, Basefarm, Login Consultants and The unbelievable Machine Company (*um), into it, totaling 2,600 cloud experts. Orange Business Services is headquartered in Paris and serves more than 3,000 multinational enterprises. In 2021, it reported €7.8 billion in revenue with 43 percent in IT and IS.

Strengths

Power of the scale of operations: Orange Business Services' Go2Cloud framework supports clients' cloud journeys from design to operations. Orange Business Services leverages its parent company's scale and partner ecosystem to offer clients advanced AIOps and FinOps, including detailed spend reporting for hybrid cloud utilization, covering AWS, Azure and Google.

Compliance and sovereignty: Orange Business Services offers guidance and tools to manage clients' data location, data sovereignty, security and cyber defense. Its managed services include edge computing and IoT, with more than 19 million managed IoT devices. It focuses on talent development to offer services with French experts for full compliance, providing it with sustainable growth.

Service automation platform: Orange Business Services' toolset enables auto incident classification, assisted remediation, self-service with orchestrated workflows, predictive maintenance and capacity planning, service analytic dashboards and reporting with AI insights. The company provides DevOps automation, IaC, serverless computing and advanced data services.

Caution

Orange Business Services has operations on all continents. However, its cloud service capacity is concentrated in Europe and APAC. Clients requiring support for international operations should check regional availability.

Appendix

Methodology & Team

The ISG Provider Lens™ 2022 – Public Cloud - Solutions & Services research study analyzes the relevant software vendors/service providers in the French market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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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 September 2022, 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 study was divided into the following steps:

1. Definition of Public Cloud - Solutions & Services market

2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics

3. Interactive discussions with service providers/vendors on capabilities & use cases

4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)

5. Use of Star of Excellence CX-Data

6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.

7. Use of the following key evaluation criteria:

   * Strategy & vision

   * Tech Innovation

   * Brand awareness and presence in the market

   * Sales and partner landscape

   * Breadth and depth of portfolio of services offered

   * CX and Recommendation

Author & Editor Biographies

Author

Pedro L. Bicudo Maschio
Lead Analyst

Distinguished analyst and author, Pedro Maschio brings extensive experience in the research of the SEMEA (Southern Europe Middle East and Africa) and Latin America service 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 APAC.

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.

Enterprise Context and Overview Analyst

Chandra Shekhar Sharma
Research Specialist

Chandra Shekhar Sharma is a Research Specialist at ISG and is responsible for supporting ISG Provider Lens™ studies on Private Hybrid Cloud and Public Cloud Data Center Solution and Services. He supports the lead analysts of multiple regions in the research process and authors the global summary report. Shekhar is responsible for delivering enterprise' perspective for IPL and collaborates with analyst, advisors, and enterprise clients on various ad-hoc research requests. He comes with over eight years of research and consulting experience into IT industry. Prior to this role, he has been associated with several custom market and procurement research firms, in which he has delivered actionable insights and recommendations around market sizing and forecasting, industry level trends and drivers, procurement best practices, sourcing models and strategy, competitive benchmarking, market share analysis and vendor landscape for industry verticals such as IT hardware, IT services, transportation and warehousing.

Author & Editor Biographies

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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