Cloud and Infrastructure I Europe I 2022

Azure IT Ecosystem in France 2022

SITSI® I Vendor Analysis I PAC INNOVATION RADAR

Positioning of Orange Business Services

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PAC INNOVATION RADAR GRAPH

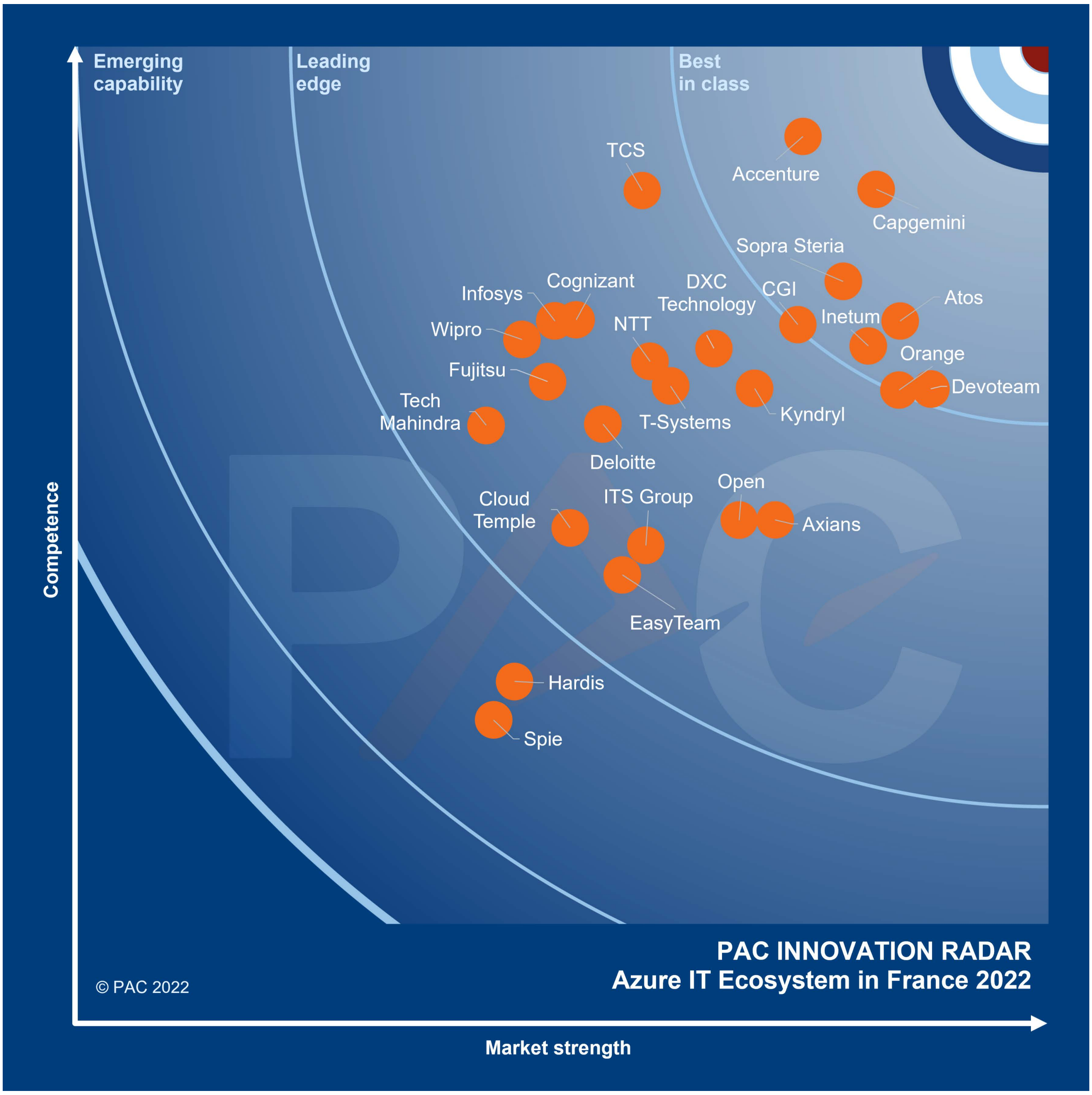

Fig. 1: PAC INNOVATION RADAR graph

INTRODUCTION

Azure Services in Europe

Cloud adoption is one of the key components for enterprises looking to drive digital transformation projects making cloud services one of the most dynamic markets in the IT services industry. If private cloud solutions were historically the norm, adoption of public cloud is rapidly gaining traction. According to PAC's latest SITSI® CxO Investment Priorities Survey[1], 34% of organizations already use public cloud services and another 32% expect to do so, in some form or another, over the next two years.

The public IaaS/PaaS market is dominated by three giants, Amazon Web Services, Google Cloud Platform and Microsoft Azure, but hybrid cloud models are now becoming the norm with enterprises choosing a combination of cloud providers to get the best services according to their specific needs. This means it is becoming increasingly important for companies to be able to evaluate their IT service providers capabilities, not just on a specific IaaS supplier, but also on the specific capabilities and business outcomes it is looking for.

IT services giants, large consultancies, and innovative boutiques are positioned to make up a dynamic and diverse ecosystem catering to what seems like insatiable enterprise demand for new cloud services.

In this market, developing points of clear differentiation is a challenging prospect, and many of the firms profiled in this study are investing aggressively in talent, assets, and solutions to forge ahead and take a larger chunk out of the growing market.

Why have we focused our research on the Azure services market?

The Azure services market is one of the fastest growing subsegment of the IT service industry as public cloud adoption penetrates all sizes and sectors of the market and Microsoft benefits from the success of its offering. Indeed, over two thirds of respondents already do use Microsoft Azure or plan to do so over the next two years, according to PAC's latest SITSI® CxO Investment Priorities Survey (see figure).

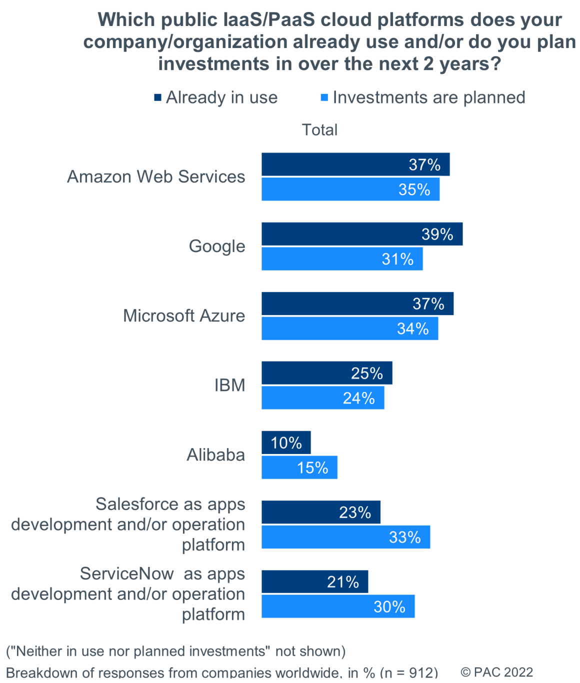

Fig. 1: SITSI® CxO Investment Priorities Survey

[1] *For the full survey, please refer to: https://www.sitsi.com/cxo-survey-investment-priorities-detailed-datamart-worldwide-2*

It is important, then, for PAC, as a trusted voice in this market, to assess the leading and most mature providers in the market today, with a view to providing an ongoing benchmark for their capability as it evolves over the coming years. Now, more than ever, enterprise buyers need support in selecting the right partner for their business.

To provide this view of the market, we assessed 28 service providers delivering Azure services to the European market, ranging from the largest, international vendors (Capgemini, TCS, etc.) to the main European players (Orange Business Services, Sopra Steria, etc.), to smaller, either local actors (Open in France) or groups focusing on a particular subject of expertise (Computacenter on Azure Workplace Services for example).

THE TRENDS IN DETAIL

Key findings from the Azure Services RADAR – Overall Capabilities Europe

With solid double-digit annual growth in Europe, the Azure services market is extremely dynamic and therefore strategic for most IT services providers who are all investing massively and building capabilities around the technology. This makes for a diverse ecosystem where IT service providers need to fight for talent and differentiate themselves through innovative solutions.

Talent war and certifications drive investments

For IT suppliers, this rapidly growing market poses some industry-wide challenges, most notably the talent war taking place on certain key competencies (security, data, DevOps, etc.) as enterprises and providers alike race to secure the best and brightest professionals to support their cloud migration.

This battle has seen leading providers push ahead with innovative and well-funded attraction, retention, and training programs for their employees as well as the creation of innovative university partnerships to secure the needed talent to meet the growing market needs.

IT suppliers are also investing heavily to ramp up their certified talent pool, an element which can become a guarantee of quality and a clear differentiator when human resources become scarce.

Asset development and verticalization are key differentiators

In this dynamic and fast-moving market, it is important for the leading IT providers to differentiate themselves through the development of assets and solutions that add value. These vary from internal accelerators to implementations of analytics and AI capabilities to develop their own IP.

The development of tailored vertical solutions and use cases for the platform also allows to build custom applications that support broader business and industry challenges.

Developing a strong partnership with Microsoft is also a key enabler, allowing to rapidly co-develop solutions that add the most value or even address the market through co-sale or co-marketing approaches. The Azure store is now well-stocked with provider-developed solutions ranging from general automation capabilities to highly specific industry solutions.

A diverse ecosystem of IT service providers

All these elements have been considered to benchmark IT suppliers in this series of eight PAC RADAR analyses around the Azure services ecosystem. Two of them evaluate the providers' overall capabilities according to geographical reach (Europe, France), two of them according to operational capabilities (Consulting & Systems Integration, Outsourcing Services) and four according to specific technological capabilities (IaaS/PaaS & Security, Data & AI, Application Modernization, Workplace services).

This PAC RADAR focuses on the IT providers' overall capabilities around Azure services in France. It considers their capacities to meet their clients' needs thanks to dedicated solutions and a local presence. Many of the firms successful in this study are those which have continued to innovate, unlock new value through the development of intellectual property, and successfully train and keep the talent necessary to succeed in this competitive market. The challenge will be continuing to maintain this momentum as more firms double down on investments, and the boutique ecosystem continues to evolve, bringing fresh competitors into the mix.

RADAR by PAC

PAC INNOVATION RADAR "AZURE IT ECOSYSTEM IN FRANCE 2022"

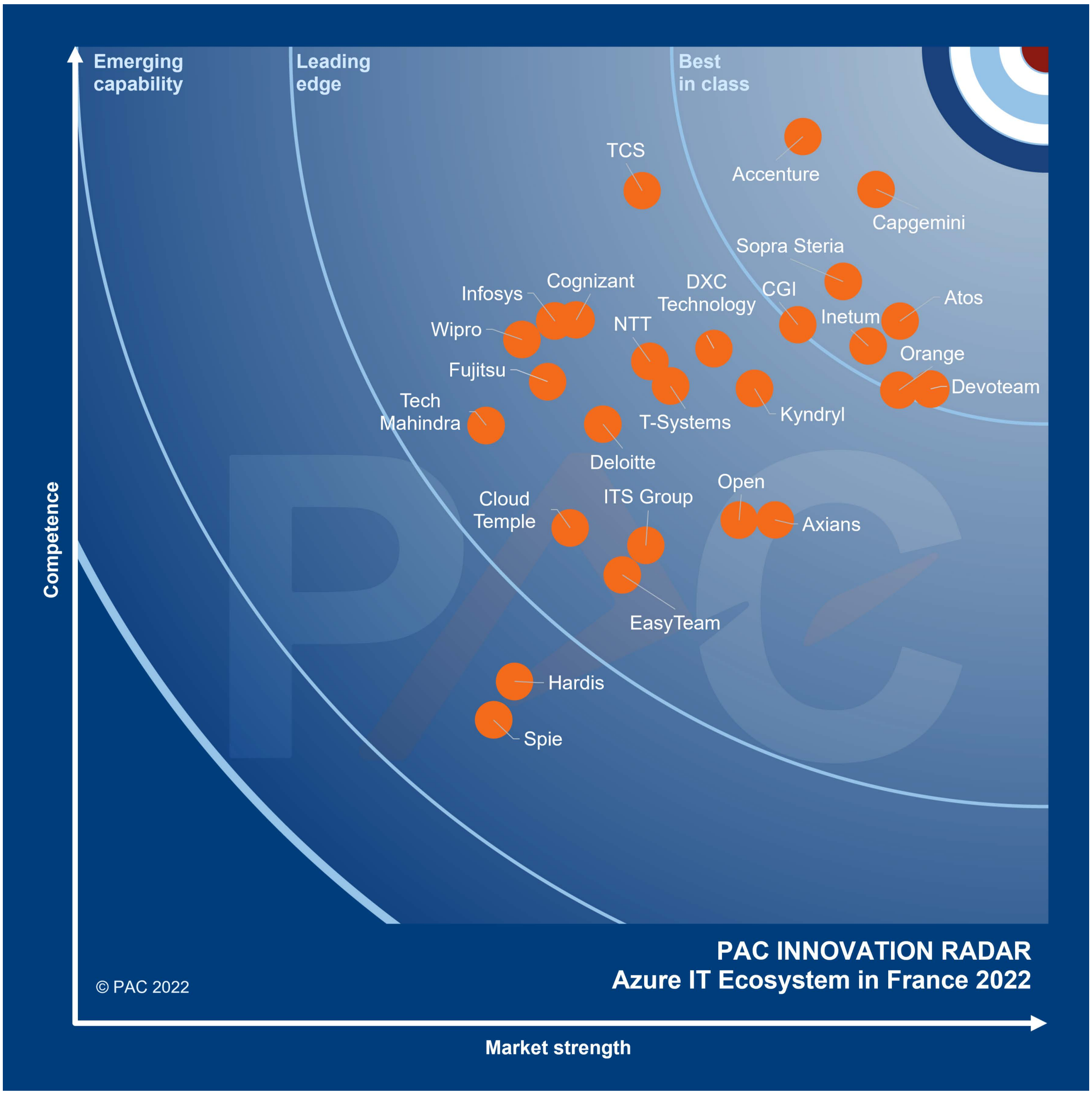

Fig. 2: PAC INNOVATION RADAR "Azure IT Ecosystem in France 2022"

The classification of providers is based on the overall score:

“Best in Class”	1.0 – 1.9
“Leading edge”	2.0 – 2.9
“Emerging capability”	3.0 – 3.9

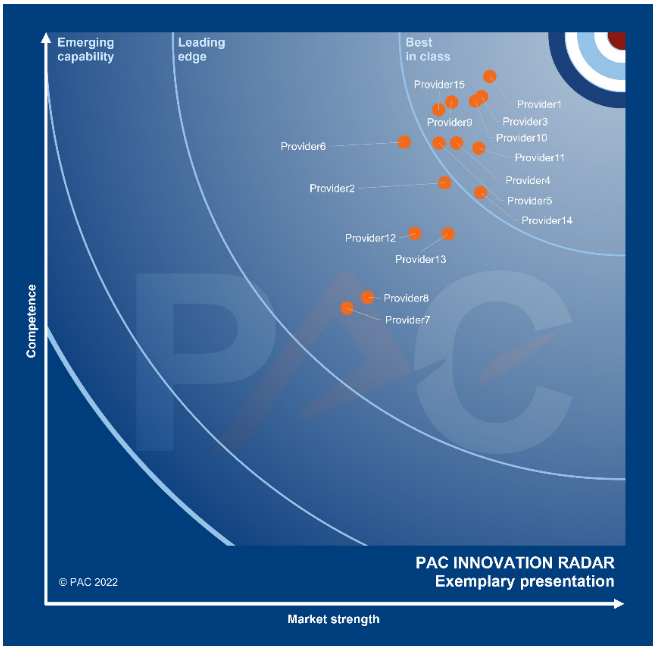

Fig. 10: Classification of providers in the PAC INNOVATION RADAR graph (example)

REVIEW OF TOP-SEEDED PROVIDER ORANGE BUSINESS SERVICES

Orange Business Services

PAC INNOVATION RADAR

Azure IT Ecosystem in France 2022 **Leading Edge**

Cluster	Average	Orange Business Services
Relative Market Strength	2.42	1.58
Competence	2.37	2.34
Total Score	**2.39**	**2.02**

Key strengths

Market position	Orange is one of the leading IT services providers in France, with a solid installed base in traditional infrastructure services, which can be leveraged into new, broader reaching, hybrid-cloud and Azure services.
Talent pool	The group has over 650 certified staff around Azure-related services, with the majority dedicated to France.

Growth opportunities

Security & Sovereignty Capabilities	Orange has leading, end-to-end, cybersecurity capabilities through its Orange Cybersecurity division. Moreover, through Bleu, its joint-venture with Microsoft and Capgemini, Orange will be able to address the market for sovereign cloud solutions.
Strategic focus	In 2020, creation of an Azure Practice with dedicated staff focused around growing the technology. Azure accounts for ≈60% of all the hyperscalers' certifications the group has.

OBJECTIVE OF THE PAC RADAR

The PAC RADAR is an effective tool for the holistic evaluation and visual positioning of software and ICT service providers on local markets. Numerous ICT and business decision-makers in user companies of all industries and company sizes rely on the PAC RADAR when selecting their partners and developing their sourcing strategies.

With the help of predefined criteria, PAC evaluates and compares providers' strategies, development, and market position in addition to performance and competencies within specific market segments.

Each PAC INNOVATION RADAR focuses on a certain IT services segment. Up to 30 leading providers are evaluated per segment. Participation in the PAC INNOVATION RADAR is free of charge.

All providers are evaluated using PAC's proven methodology, which is based on personal face-to-face interviews.

PAC reserves to also evaluate and position those providers in the PAC INNOVATION RADAR that do not participate in the self-disclosure process.

After the evaluation of the predefined criteria, each supplier's position is plotted in the PAC INNOVATION RADAR.

The criteria are classified by clusters and can all be attributed to the "Competence" and "Market Strength" main clusters. Within the PAC INNOVATION RADAR the following applies: The closer a company is to the center, the closer they are to meeting customers' requirements.

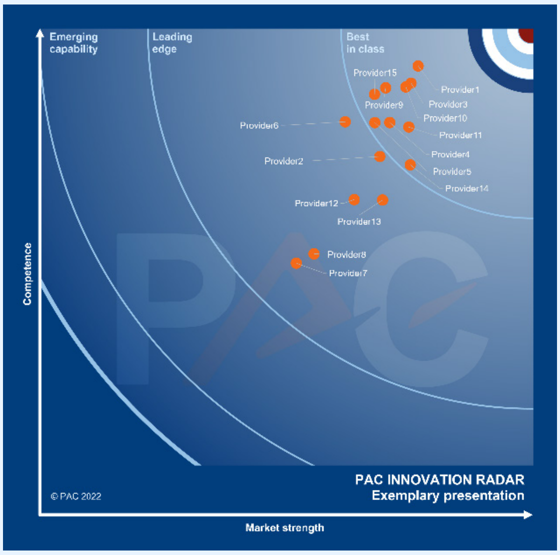

Fig. 3: PAC INNOVATION RADAR graph (exemplary presentation)

SCOPE & DEFINITION

How does PAC segment the provider landscape for Microsoft Azure?

PAC has evaluated the Microsoft Azure IT ecosystem in Europe and in France by eight PAC INNOVATION RADAR segments dedicated to specific geographies, capabilities and use cases[2]:

Azure Ecosystem in Europe (overall results) – In this PAC INNOVATION RADAR we evaluate the entire range of services and capabilities of IT service providers around Microsoft Azure in Europe. This includes services around public and private instances of Azure deployments across both the cloud and the edge.

Azure Ecosystem in France (overall results) – In this PAC INNOVATION RADAR we evaluate the entire range of services and capabilities of IT service providers around Microsoft Azure in France. This includes services around public and private instances of Azure deployments across both the cloud and the edge.

Azure C&SI Capabilities in Europe – In this PAC INNOVATION RADAR we evaluate the different IT service providers' capabilities in Consulting & Systems Integration (C&SI) around Microsoft Azure in Europe. It aims to recognize outstanding success and innovation.

Azure Outsourcing & Managed Services Capabilities in Europe – In this PAC INNOVATION RADAR we evaluate the different IT service providers' capabilities in Outsourcing and Managed Services around Microsoft Azure in Europe. It aims to recognize outstanding success and innovation.

Azure IaaS/PaaS & Security Capabilities in Europe – In this PAC INNOVATION RADAR we evaluate the different IT service providers' capabilities in IaaS/PaaS & Security services around Microsoft Azure in Europe. This includes, non-exhaustively, cloud platforms, data centers, cloud security, Kubernetes on Azure, FinOps, etc.

Azure Data & AI Capabilities in Europe – In this PAC INNOVATION RADAR we evaluate the different IT service providers' capabilities in IaaS/PaaS & Security services around Microsoft Azure in Europe. This includes, non-exhaustively, data analytics, data platform, analytics, Azure Cognitive Services solutions, etc.

Azure Application Development & Management Capabilities in Europe – In this PAC INNOVATION RADAR we evaluate the different IT service providers' capabilities in IaaS/PaaS & Security services around Microsoft Azure in Europe. This includes, non-exhaustively, cloud business applications, enterprise resource planning, DevOps, SAP on Microsoft Azure, etc.

Azure Workplace-related Capabilities in Europe – In this PAC INNOVATION RADAR we evaluate the different IT service providers' capabilities in IaaS/PaaS & Security services around Microsoft Azure in Europe. This includes, non-exhaustively, Windows & devices, collaboration & content, communications, Windows Virtual Desktops, etc.

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[2] *Depending on their specific focus, the providers will be positioned in one or more of the PAC INNOVATION RADAR analyses.*

PAC RADAR EVALUATION METHOD

Provider selection & participation

Which providers are positioned in the PAC INNOVATION RADAR?

Providers are selected and invited according to the following criteria:

- Positioning and business activities in the segment to be analyzed in the specified region;
- "Relevance": Even providers that do not belong to the top-selling providers in the segment to be analyzed are considered if PAC classifies them as relevant for potential customers, for instance due to an innovative offering, strong growth, or a compelling vision.

There is no differentiation as to whether the providers are customers of PAC – neither in the selection of the providers to be positioned, nor in the actual evaluation.

What do providers have to do in order to be considered in a PAC INNOVATION RADAR analysis?

The decision as to which providers are considered in the PAC INNOVATION RADAR analysis is entirely up to PAC. Providers do not have any direct influence on this decision.

However, in the run-up to a PAC INNOVATION RADAR analysis, providers can make sure in an indirect way that PAC can adequately evaluate their offerings and positioning – and thus their relevance – e.g., by means of regular analyst briefings, etc.

Why should providers accept the invitation to actively participate?

Whether or not a provider participates in the RADAR process does not actually affect their inclusion and positioning in the PAC INNOVATION RADAR, nor their assessment. However, there are a whole host of benefits associated with active participation:

- Participation ensures that PAC has access to the largest possible range of specific and up-to-date data as a basis for the assessment;
- Participating providers can set out their specific competencies, strengths, and weaknesses as well as their strategies and visions;
- The review process guarantees the accuracy of the assessed factors;
- The provider gets a neutral, comprehensive, and detailed view of their strengths and weaknesses as compared to the direct competition – related to a specific service in a local market;
- A positioning in the PAC INNOVATION RADAR gives the provider prominence amongst a broad readership as one of the leading operators in the segment under consideration

RADAR by PAC

Considered providers by segment

Azure IT Ecosystem in Europe 2022	Azure IT Ecosystem in France 2022	Azure – C&SI Capabilities in Europe 2022	Azure – Outsourcing & Managed Services Capabilities in Europe 2022
Accenture	Accenture	Accenture	Accenture
Atos	Atos	Atos	Atos
Capgemini	Axians	Capgemini	Capgemini
CGI	Capgemini	CGI	CGI
Cognizant	CGI	Cognizant	Cognizant
Deloitte	Cloud Temple	Deloitte	Devoteam
Devoteam	Cognizant	Devoteam	DXC Technology
DXC Technology	Deloitte	DXC Technology	Fujitsu
Fujitsu	Devoteam	Fujitsu	Inetum
Inetum	DXC Technology	Inetum	Infosys
Infosys	EasyTeam	Infosys	Kyndryl
Kyndryl	Fujitsu	Kyndryl	NTT
NTT	Hardis	NTT	Orange Business Services
Orange Business Services	Inetum	Orange Business Services	Reply
Reply	Infosys	Reply	Sopra Steria
Sopra Steria	ITS Group	Sopra Steria	TCS
TCS	Kyndryl	TCS	Tech Mahindra
Tech Mahindra	NTT	Tech Mahindra	T-Systems
T-Systems	Open	T-Systems	Wipro
Wipro	Orange Business Services	Wipro	
	Sopra Steria		
	Spie		
	TCS		
	Tech Mahindra		
	T-Systems		
	Wipro		

Azure – IaaS/PaaS & Security Capabilities in Europe 2022	Azure – Data & AI Capabilities in Europe 2022	Azure – App Development & Mgmt. in Europe 2022	Azure – Workplace-related Capabilities in Europe 2022
Accenture	Accenture	Accenture	Accenture
Atos	Atos	Atos	Atos
Capgemini	Capgemini	Capgemini	Axians
CGI	CGI	CGI	Capgemini
Cognizant	Cognizant	Cognizant	CGI
Deloitte	Deloitte	Deloitte	Cognizant
Devoteam	Devoteam	Devoteam	Computacenter
DXC Technology	DXC Technology	DXC Technology	Deloitte
Fujitsu	Fujitsu	Fujitsu	Devoteam
Inetum	Inetum	Inetum	DXC Technology
Infosys	Infosys	Infosys	Fujitsu
Kyndryl	Kyndryl	Kyndryl	Inetum
NTT	NTT	NTT	Infosys
Orange Business Services	Orange Business Services	Orange Business Services	Kyndryl
Reply	Reply	Reply	NTT
Sopra Steria	Sopra Steria	Sopra Steria	Orange Business Services
TCS	TCS	TCS	Sopra Steria
Tech Mahindra	Tech Mahindra	Tech Mahindra	Spie
T-Systems	T-Systems	T-Systems	TCS
Wipro	Wipro	Wipro	Tech Mahindra
			T-Systems
			Wipro

The concept

Evaluation of criteria at cluster and sub-cluster levels					
Main cluster	Competence			Market strength	
Cluster	Strategy	Portfolio	Go-to-market	Market position	Market growth

Fig. 4: PAC INNOVATION RADAR – evaluation method

PAC uses **predefined criteria** to assess and compare the providers within given service segments.

The assessment is based on the report-card score within the peer group of the positioned providers.

This is based on:

- Dedicated face-to-face interviews with the providers about resources, distribution, delivery, portfolio, contract drafting, pricing, customer structure, client references, investments, partnerships, certifications, etc.;
- The analysis of existing PAC databases;
- Secondary research;
- If applicable, a poll among customers by PAC.

The provider data is verified by PAC and any omissions are rectified based on estimates.

If the provider does not participate, the assessment is performed using the proven PAC methodology, in particular based on:

- Information obtained from face-to-face interviews with the provider's representatives, analyst briefings, etc.;
- An assessment of company presentations, company reports, etc.;
- An assessment of PAC databases;
- An assessment of earlier PAC (INNOVATION) RADARs in which the provider participated;
- A poll among the provider's customers (as required) on their experiences and satisfaction.

RADAR by PAC

Evaluation criteria

Azure IT Ecosystem in Europe

Main cluster "Competence"

- **Sub-cluster "Strategy"**
  - Strength of overall Cloud strategy
  - Strength of dedicated Microsoft Azure strategy and alignment with MSFT's vision
  - Level of investments over past few years (Capex & M&A)
  - Level of investments over past few years (tools & industry solutions)
  - Level of automatization and industrialization of processes
- **Sub-cluster "Talent Pool & Certifications"**
  - # of people dedicated in Azure in Europe
  - # of Sales & marketing people dedicated in Azure in Europe
  - # of Azure certified people dedicated to Europe
  - Focus on Azure vs other hyperscalers (# certifications)
  - Number of total gold certifications
  - Number of total advanced specialization
  - Number of total MSP expertise
- **Sub-cluster "Go-to-market"**
  - Level of cooperation with Azure (products / co-engagement / co-development)
  - Level of cooperation with Azure (governance / go to market / field alignment)
  - End-to-end Capabilities
  - Level of proximity, shared vision & cultural fit

Main cluster "Market Strength"

- **Sub-cluster "cloud revenues & installed base"**
  - Total Cloud revenues Europe
  - Cloud as % of total IT Services revenues in Europe
  - Focus on Azure vs other hyperscalers (revenues)
  - Focus on large accounts w/ transformative functions
- **Sub-cluster "Customers and market proximity"**
  - Proximity with Microsoft in go-to market approach
  - Local delivery capabilities in Europe
  - Does have high level of verticalized offerings
  - Notoriety of customers & installed base in Europe
  - Market recognition in Europe

Azure IT Ecosystem in France

Main cluster "Competence"

- **Sub-cluster "Strategy"**
  - Strength of overall Cloud strategy
  - Strength of dedicated Microsoft Azure strategy and alignment with MSFT's vision
  - Level of investments over past few years (Capex & M&A)
  - Level of investments over past few years (tools & industry solutions)
  - Level of automatization and industrialization of processes
- **Sub-cluster "Talent Pool & Certifications"**
  - # of people dedicated in Azure in France
  - # of Sales & marketing people dedicated in Azure in France
  - # of Azure certified people dedicated to France
  - Focus on Azure vs other hyperscalers (# certifications)
  - Number of total gold certifications
  - Number of total advanced specialization
  - Number of total MSP expertise
- **Sub-cluster "Go-to-market"**
  - Level of cooperation with Azure (products / co-engagement / co-development)
  - Level of cooperation with Azure (governance / go to market / field alignment)
  - End-to-end Capabilities in France
  - Level of proximity, shared vision & cultural fit

Main cluster "Market Strength"

- **Sub-cluster "cloud revenues & installed base"**
  - Total Cloud revenues France
  - Cloud as % of total IT Services revenues in France
  - Focus on Azure vs other hyperscalers in France (revenues)
  - Focus on large accounts w/ transformative functions
- **Sub-cluster "Customers and market proximity"**
  - Proximity with Microsoft in go-to market approach
  - Local delivery capabilities in France
  - Does have high level of verticalized offerings
  - Notoriety of customers & installed base in France

Azure C&SI Capabilities in Europe

Main cluster "Competence"

- **Sub-cluster "Strategy"**
  - Strength of overall cloud C&SI strategy
  - Strength of dedicated Microsoft Azure strategy and alignment with MSFT's vision
  - Level of investments over past few years in C&SI capabilities
  - Level of automatization and industrialization of processes
- **Sub-cluster "Talent Pool & Certifications"**
  - # of people dedicated in Azure in Europe
  - # of Sales & marketing people dedicated in Azure in Europe
  - # of Azure certified people dedicated to Europe
  - Focus on Azure vs other hyperscalers (# certifications)
- **Sub-cluster "Go-to-market"**
  - Level of cooperation with Azure (products / co-engagement / co-development)
  - Level of cooperation with Azure (governance / go to market / field alignment)
  - Level of proximity, shared vision & cultural fit for consulting activities

Main cluster "Market Strength"

- **Sub-cluster "cloud revenues & installed base"**
  - Total Cloud revenues Europe
  - Cloud as % of total IT Services revenues in Europe
  - C&SI as % of total cloud revenues
  - Focus on Azure vs other hyperscalers (revenues)
  - Future investment strategy in C&SI
- **Sub-cluster "Customers and market proximity"**
  - Proximity with Microsoft in go-to market approach
  - Local delivery capabilities in Europe
  - Does have high level of verticalized offerings
  - Notoriety of customers & installed base in Europe around C&SI
  - Market recognition in Europe

Azure Outsourcing & Managed Services Capabilities in Europe

Main cluster "Competence"

- **Sub-cluster "Strategy"**
  - Strength of overall cloud outsourcing & managed services strategy
  - Strength of dedicated Microsoft Azure strategy and alignment with MSFT's vision
  - Level of investments over past few years in outsourcing capabilities
  - Level of automatization and industrialization of processes
- **Sub-cluster "Talent Pool & Certifications"**
  - # of people dedicated in Azure in Europe
  - # of Sales & marketing people dedicated in Azure in Europe
  - # of Azure certified people dedicated to Europe
  - Focus on Azure vs other hyperscalers (# certifications)
- **Sub-cluster "Go-to-market"**
  - Level of cooperation with Azure (products / co-engagement / co-development)
  - Level of cooperation with Azure (governance / go to market / field alignment)
  - End-to-end Capabilities for managed services

Main cluster "Market Strength"

- **Sub-cluster "cloud revenues & installed base"**
  - Total Cloud revenues France
  - Cloud as % of total IT Services revenues in Europe
  - Outsourcing / Managed services as % total cloud revenues
  - Focus on Azure vs other hyperscalers in Europe (revenues)
  - Future investment strategy in outsourcing / managed services
- **Sub-cluster "Customers and market proximity"**
  - Proximity with Microsoft in go-to market approach
  - Local delivery capabilities in Europe
  - Does have high level of verticalized offerings
  - Notoriety of customers & installed base in Europe around outsourcing & managed services
  - Market recognition in Europe

RADAR by PAC

Azure IaaS/PaaS & Security Capabilities in Europe

Main cluster "Competence"

- **Sub-cluster "Strategy"**
  - Strength of IaaS/PaaS and Security strategy around Azure
  - Level of investments over past few years in IaaS/PaaS and Security capabilities
  - Level of automatization and industrialization of processes
- **Sub-cluster "Talent Pool & Certifications"**
  - # of people dedicated in Azure in Europe
  - # of Azure certified people dedicated to Europe
  - # of Azure certified people on IaaS/PaaS and Security
  - # of Azure advanced specializations on IaaS/PaaS and Security
- **Sub-cluster "Go-to-market"**
  - Level of cooperation with Azure (products / co-engagement / co-development)
  - Level of cooperation with Azure (governance / go to market / field alignment)
  - End-to-end Capabilities

Main cluster "Market Strength"

- **Sub-cluster "cloud revenues & installed base"**
  - Total Cloud revenues Europe
  - Cloud as % of total IT Services revenues in Europe
  - IaaS/PaaS and Security as % of total cloud revenues
  - Future investment strategy in IaaS/PaaS and Security
- **Sub-cluster "Customers and market proximity"**
  - Proximity with Microsoft in go-to market approach
  - Local delivery capabilities in Europe
  - Does have high level of verticalized offerings
  - Notoriety of customers & installed base in Europe around IaaS/PaaS and Security
  - Focus on large accounts with transformative & innovative solutions

Azure Data & AI Capabilities in Europe

Main cluster "Competence"

- **Sub-cluster "Strategy"**
  - Strength of data & AI cloud strategy around Azure
  - Level of investments over past few years in data & AI capabilities
  - Level of automatization and industrialization of processes
- **Sub-cluster "Talent Pool & Certifications"**
  - # of people dedicated in Azure in Europe
  - # of Azure certified people dedicated to Europe
  - # of Azure certified people on Data and AI
  - # of Azure advanced specializations on Data and AI
- **Sub-cluster "Go-to-market"**
  - Level of cooperation with Azure (products / co-engagement / co-development)
  - Level of cooperation with Azure (governance / go to market / field alignment)
  - End-to-end Capabilities

Main cluster "Market Strength"

- **Sub-cluster "cloud revenues & installed base"**
  - Total Cloud revenues France
  - Cloud as % of total IT Services revenues in Europe
  - IA and Data as % total cloud revenues
  - Future investment strategy in Data and IA
- **Sub-cluster "Customers and market proximity"**
  - Proximity with Microsoft in go-to market approach
  - Local delivery capabilities in Europe
  - Does have high level of verticalized offerings
  - Notoriety of customers & installed base in Europe around Data and AI
  - Focus on large accounts with transformative & innovative solutions

RADAR by PAC

Azure Application Development & Management Capabilities in Europe

Main cluster "Competence"

- **Sub-cluster "Strategy"**
  - Strength of App. Development & Management strategy around Azure
  - Level of investments over past few years in App. Development & Management capabilities
  - Level of automatization and industrialization of processes
- **Sub-cluster "Talent Pool & Certifications"**
  - # of people dedicated in Azure in Europe
  - # of Azure certified people dedicated to Europe
  - # of Azure certified people on App. Development & Management
  - # of Azure advanced specializations on App. Development & Management
- **Sub-cluster "Go-to-market"**
  - Level of cooperation with Azure (products / co-engagement / co-development)
  - Level of cooperation with Azure (governance / go to market / field alignment)
  - End-to-end Capabilities

Main cluster "Market Strength"

- **Sub-cluster "cloud revenues & installed base"**
  - Total Cloud revenues Europe
  - Cloud as % of total IT Services revenues in Europe
  - App. Development & Management as % of total cloud revenues
  - Future investment strategy in App. Development & Management
- **Sub-cluster "Customers and market proximity"**
  - Proximity with Microsoft in go-to market approach
  - Local delivery capabilities in Europe
  - Does have high level of verticalized offerings
  - Notoriety of customers & installed base in App. Development & Management
  - Focus on large accounts with transformative & innovative solutions

Azure Workplace-related Capabilities in Europe

Main cluster "Competence"

- **Sub-cluster "Strategy"**
  - Strength of workplace strategy around Azure
  - Level of investments over past few years in workplace capabilities
  - Level of automatization and industrialization of processes
- **Sub-cluster "Talent Pool & Certifications"**
  - # of people dedicated in Azure in Europe
  - # of Azure certified people dedicated to Europe
  - # of Azure certified people on workplace
  - # of Azure advanced specializations on workplace
- **Sub-cluster "Go-to-market"**
  - Level of cooperation with Azure (products / co-engagement / co-development)
  - Level of cooperation with Azure (governance / go to market / field alignment)
  - End-to-end Capabilities

Main cluster "Market Strength"

- **Sub-cluster "cloud revenues & installed base"**
  - Total Cloud revenues France
  - Cloud as % of total IT Services revenues in Europe
  - Workplace as % total cloud revenues
  - Future investment strategy in workplace capabilities
- **Sub-cluster "Customers and market proximity"**
  - Proximity with Microsoft in go-to market approach
  - Local delivery capabilities in Europe
  - Does have high level of verticalized offerings
  - Notoriety of customers & installed base in Europe around Workplace
  - Focus on large accounts with transformative & innovative solutions

General PAC research method

The following overview describes PAC's research method for market analysis and key differentiation features.

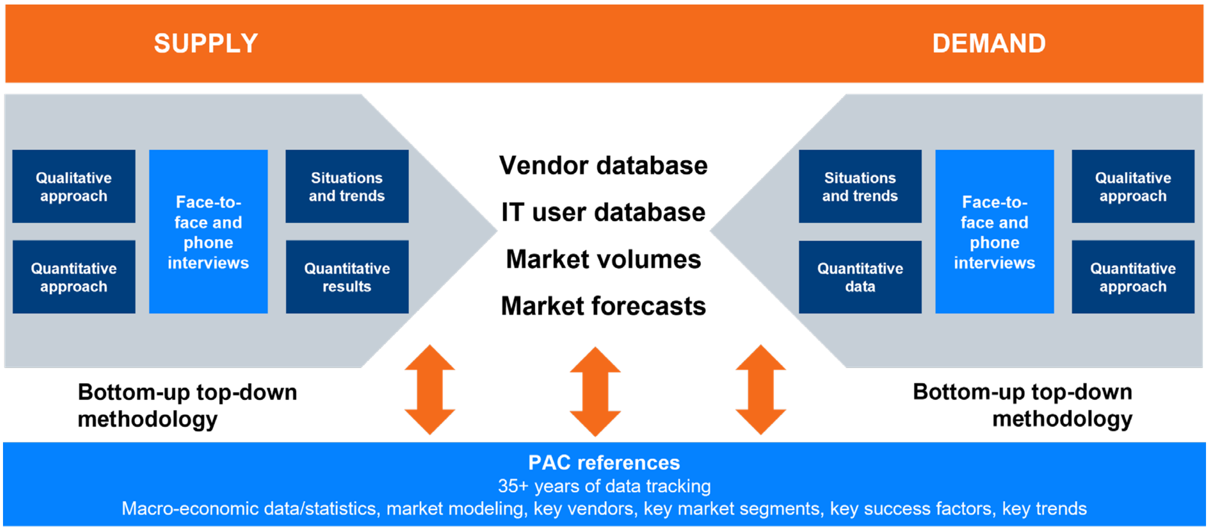

Fig. 5: Description of the PAC methodology

Local research and face-to-face communication are two core elements of PAC's methodology. In our market studies, we can draw on more than 40 years of experience in Europe.

Positioning within the PAC INNOVATION RADAR

Based on the scores in competence and market strength, the overall score is calculated (calculation: competence score plus market strength score, divided by two). From the resulting overall score, each provider receives their characteristic positioning within the PAC INNOVATION RADAR. Here, the following applies: The closer a provider is to the upper right corner, the closer they are to meeting customers' requirements for that segment.

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