

Public Cloud – Services & Solutions

Managed Public Cloud Services for Large Accounts

France 2021

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



Business
Services

December 2021

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 July 2021, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

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EXECUTIVE SUMMARY

Public cloud use is accelerating in France. In 2021, the French Government declared its support to cloud adoption to allow French companies and administrations to benefit from the best cloud services. The government strategy defines three pillars to further this cause – cloud de confiance (trusted cloud), cloud au centre (cloud at the center) and Politique Industrielle (incentives for high-value-added projects, including AI, analytics and collaboration).

The announcement is a part of the France Relance recovery plan, compelling business executives and governments to prioritize cloud adoption. The government push on cloud has, correspondingly, drawn attention to concerns around data privacy, data sovereignty, cyberattacks and extraterritorial legislation, including access to citizen data and company secrets. The intent is to protect sensitive data from the U.S. Cloud Act (it can mandate access to data hosted by any U.S.-based company), and espionage or sabotage by other countries and terrorist groups.

The global IT service providers tend to oversimplify these concerns by offering General Data Protection Regulation (GDPR) compliance. IT executives in France need to understand the nuances that differentiate GDPR compliance, data sovereignty, cybercrime and espionage for better decision making around IT spending, security tools and service provider choices.

Trusted Cloud – Agence nationale de la sécurité des systèmes d'information (ANSSI) will issue SecNumCloud visa (certificates) for companies that have European shareholders (company ownership) and local or licensed foreign technologies. The certificate ensures

data residency in Europe and data loss prevention tools are effective. Capgemini and Orange announced the creation of the first company, Bleu, under the Trusted Cloud title, ensuring French ownership while offering Microsoft's cloud technologies. Bleu should start operations in 2022. Outscale and OVHcloud were the first to be certified. ISG expects Scaleway to soon announce a Trusted Cloud certification.

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

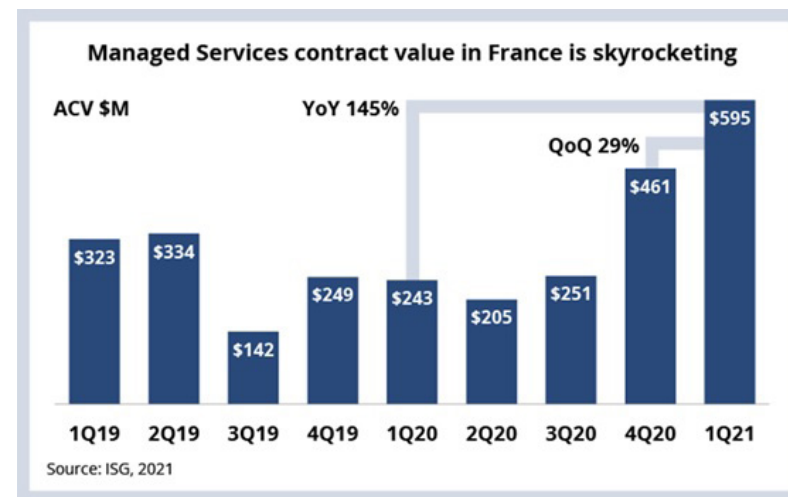
An ambitious industrial strategy – The French Government offers direct support for high value-added projects under the 4th Program of Investments for the Future and France Relance (economy recovery plan). It targets critical technologies such as Platform as a Service (PaaS) solutions for the deployment of AI and big data or collaborative work software suites. The program has identified five projects for which the government has committed more than €100 million.

French cloud market implications – ISG has identified three categories of companies in this context: The first group includes France-based multinationals such as Carrefour, Group Cassino and Renault that are using the public cloud with full GDPR compliance. Their operations and data are distributed across many countries; data sovereignty is

intangible for the multinationals. The second group includes companies that are operating within France; they do not have concerns about data sovereignty and are not targets for espionage. Foreign access to their business data would not have any relevant impact. They are concerned with cybersecurity and GDPR compliance that any public cloud can provide. The third group comprises the French State, public agencies, regional authorities, hospitals and companies classified as Opérateurs d'Importance Vitale (OIV) and Opérateurs de Services Essentiels (OSE). This group holds citizens' health data, scientific research data, government secrets, detailed tax information and other confidential data that require data sovereignty. These companies were excluded from the public cloud in the past and, starting 2021, have clear directives to accelerate their digital transformations.

All trends are positive – France is ready for cloud market growth. Globally, ISG expects cloud contract value to increase by 21 percent in 2021, with traditional IT services seeing an 8 percent rise in contract value. Some of the recent developments in Europe in this context: HCL Digital Workplace Services' agreement with Airbus; BMW Group's announcement that it is migrating workloads to AWS, joining automakers Renault and Volkswagen on AWS; Amadeus signed a deal with Microsoft Azure; and AWS won an infrastructure-as-a-service (IaaS) contract with Ferrari. In addition, Digital Realty opened its third Paris-based data center and Equinix announced that it will create the first carrier-neutral data center in the Nouvelle-Aquitaine region.

The managed services contract value in France in the fourth quarter of 2020 and the first quarter of 2021 show two quarters of outstanding growth – up by 145 percent, year over year, and 29 percent, quarter over quarter.



Merges and acquisitions on the rise – There were 93 managed services acquisitions in the first half of 2021. Accenture, IBM, Tech Mahindra, Atos, Cognizant and EPAM have been the most active IT services providers through the first half of the year. The importance of the France in this market is illustrated by the acquisition of France-based cloud services provider, Linkbynet, by Accenture, and Edifixio, by Atos.

Focus on carbon emissions – All cloud providers, colocation providers and many service providers have committed to reducing their carbon footprint, including setting target dates to achieve zero emission. For clients, migration to the public cloud can accelerate their carbon reduction programs.

AI automation adoption – Managed service providers are increasing the use of AIOps, offering 40 to 70 percent automation, depending on their toolset and AI maturity.

FinOps requires integration – No FinOps tool offers all functionalities; clients can choose service providers that integrate FinOps tools to provide comprehensive cost management dashboards.

Multicloud is pervasive – Most service providers can support more than one cloud. The market is moving from IaaS (virtual machines to run all applications) to PaaS (cloud services such as databases and tools). A client can run its transaction services on a global cloud and keep sensitive data on a cloud de confiance. The right system architecture enables clients to run on many clouds, simultaneously.

Hyperscalers fiercely competing for SAP – The announcement of RISE with SAP in December 2020 has accelerated SAP migrations to the cloud in 2021. Clients can choose the cloud to host their SAP and hyperscalers are very competitive in assessing each SAP deal. Clients that promote competitive procurement can get benefits in the pre-sales phase, bringing about insightful discussions around business innovation and optimum cloud architecture to improve performance.



Introduction

Simplified illustration

Public Cloud – Service & Solutions 2021	
Consulting and Transformation Services for Large Accounts	Consulting and Transformation Services for Midmarket
Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket
Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services

Source: ISG 2021

Definition

In the last financial year, the increase in public cloud adoption among enterprises was mainly triggered by the COVID-19 pandemic, along with other factors such as the growing digital transformation engagements, increasing recognition of the importance of cybersecurity and expanding remote working environments. The increased maturity of the cloud industry made a major impact on both enterprises and IT service providers, with both buyers and consumers witnessing a huge shift the buying behavior, from physical to digital. For enterprises, this has also impacted business models, requiring digital initiatives and prompting them to recognize the need to address governance, risk and compliance norms. Considering the widespread adoption of the as-a-service model, enterprises need to continuously evaluate cloud service providers, globally, mainly due to growing security concerns and the dynamic nature of the business landscape. Enterprises continue to seek providers that can

Definition (cont.)

act as strategic partners in carrying out cloud transformation engagements on major hyperscalers (AWS, Microsoft Azure and Google Cloud Platform). The provider will also continue to manage the workloads on an on-going basis, and help enterprises control, optimize and manage cloud expenses through FinOps strategies.

ISG reports a strong demand for digital transformation engagements, which, in turn, is driving global contracts for cloud products and services, including infrastructure-as-a-service (IaaS) and platform-as-a-service (PaaS). According to the latest 2Q21 ISG Index™, the global market has grown 32 percent in combined market annual contract value (ACV) to reach its current value of \$19.1 billion year-over-year, while the as-a-service ACV has increased by 25 percent to reach \$11.2 billion in the same period. Also, the IaaS market grew by 29 percent to reach \$15.3 billion, while the SaaS market grew by 15 percent to reach \$5.7 billion in the first half of 2021.

The ISG Provider Lens™ study offers the following to IT-decision makers:

- Strengths and weaknesses of relevant providers;
- A differentiated positioning of providers based on competitive strength and portfolio attractiveness;
- A perspective on several markets, including global, the U.S., the U.K., Germany, Switzerland, France, the Nordics and France.

This study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also leverage information from these reports to evaluate current vendor relationships and potential engagements.

Definition (cont.)

Scope of the Report

This study considers public cloud service providers including infrastructure hyperscalers and their service partners. These service providers qualified in the following six quadrants:

The **Consulting and Transformation Services for Large Accounts** quadrant assesses service providers and service integrators that partner with public cloud infrastructure providers to offer ideation of multicloud programs and industry cloud solutions, and manage customer-specific complexities related to adopting and deploying public cloud solutions. These providers focus on the large accounts market.

The **Consulting and Transformation Services for Midmarket** quadrant assesses the partners of public cloud infrastructure providers (hyperscalers) to offer ideation, strategy and planning related to cloud solutions, workload migrations and adoption of public cloud solutions, where they focus on clients in the midmarket.

The **Managed Public Cloud Services for Large Accounts** quadrant assesses service providers that offer professional and managed services on top of public cloud IaaS and PaaS from AWS, Microsoft Azure, Google Cloud Platform and other hyperscalers. These companies focus on large account clients.

The **Managed Public Cloud Services for Midmarket** quadrant assesses service providers that offer professional and managed services on top of public cloud IaaS and PaaS from AWS, Microsoft Azure, Google Cloud Platform and other hyperscalers, with focus on clients in the midmarket.

The **Hyperscale Infrastructure and Platform Services** quadrant assesses companies that provide virtual compute resources, middleware and software in a public cloud environment. Clients consume infrastructure and platform services on-demand.

The **SAP HANA Infrastructure Services** quadrant assesses cloud infrastructures optimized to host the SAP HANA database and SAP S/4HANA workloads. IaaS participants should offer data migration, system imaging, backup, restore, disaster recovery, resource usage monitoring and dashboard management services.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US\$20 million and US\$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above US\$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

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

Leader

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Product Challenger

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Market Challenger

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Contender

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in both products and services and a sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Rising Stars have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not In

The service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Public Cloud – Services & Solutions - Quadrant Provider Listing 1 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Accenture	● Leader	● Not in	● Leader	● Not in	● Not in	● Not in
Alibaba	● Not in	● Not in	● Not in	● Not in	● Contender	● Not in
Atos	● Leader	● Not in	● Leader	● Not in	● Not in	● Not in
AWS	● Not in	● Not in	● Not in	● Not in	● Leader	● Leader
Axians	● Not in	● Contender	● Not in	● Contender	● Not in	● Not in
Be-Cloud	● Not in	● Contender	● Not in	● Contender	● Not in	● Not in
Birlasoft	● Not in	● Contender	● Not in	● Contender	● Not in	● Not in
Capgemini	● Leader	● Not in	● Leader	● Not in	● Not in	● Not in
CGI	● Leader	● Not in	● Leader	● Not in	● Not in	● Not in
Claranet	● Not in	● Leader	● Not in	● Leader	● Not in	● Not in
Cloud Temple	● Not in	● Rising Star	● Not in	● Product Challenger	● Not in	● Not in

Public Cloud – Services & Solutions - Quadrant Provider Listing 2 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Cloudreach	● Not in	● Leader	● Not in	● Leader	● Not in	● Not in
Cognizant	● Product Challenger	● Not in	● Product Challenger	● Not in	● Not in	● Not in
Computacenter	● Not in	● Product Challenger	● Not in	● Product Challenger	● Not in	● Not in
Corexpert	● Not in	● Product Challenger	● Not in	● Contender	● Not in	● Not in
Crayon	● Not in	● Market Challenger	● Not in	● Contender	● Not in	● Not in
Devoteam	● Not in	● Leader	● Not in	● Leader	● Not in	● Not in
DXC	● Leader	● Not in	● Product Challenger	● Not in	● Not in	● Not in
Fujitsu	● Contender	● Not in	● Contender	● Not in	● Not in	● Not in
Google	● Not in	● Not in	● Not in	● Not in	● Leader	● Leader
HCL	● Leader	● Not in	● Product Challenger	● Not in	● Not in	● Not in
IBM	● Product Challenger	● Not in	● Leader	● Not in	● Product Challenger	● Product Challenger

Public Cloud – Services & Solutions - Quadrant Provider Listing 3 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
Infosys	● Contender	● Not in	● Contender	● Not in	● Not in	● Not in
LTI	● Rising Star	● Not in	● Product Challenger	● Not in	● Not in	● Not in
Microsoft	● Not in	● Not in	● Not in	● Not in	● Leader	● Leader
NTT DATA	● Contender	● Not in	● Contender	● Not in	● Not in	● Not in
Oracle	● Not in	● Not in	● Not in	● Not in	● Contender	● Not in
Orange Business Services	● Leader	● Leader	● Leader	● Leader	● Product Challenger	● Not in
Outscale	● Not in	● Not in	● Not in	● Not in	● Contender	● Not in
OVHcloud	● Not in	● Not in	● Not in	● Not in	● Product Challenger	● Contender
oXya	● Not in	● Leader	● Not in	● Market Challenger	● Not in	● Not in
PASàPAS	● Not in	● Contender	● Not in	● Contender	● Not in	● Not in
Reply	● Not in	● Product Challenger	● Not in	● Contender	● Not in	● Not in

Public Cloud – Services & Solutions - Quadrant Provider Listing 4 of 4

	Consulting and Transformational Services for Large Accounts	Consulting and Transformational Services for Midmarket	Managed Public Cloud Services for Large Accounts	Managed Public Cloud Services for Midmarket	Hyperscale Infrastructure and Platform Services	SAP HANA Infrastructure Services
SAP	● Not in	● Not in	● Not in	● Not in	● Not in	● Product Challenger
ScaleSquad	● Not in	● Leader	● Not in	● Leader	● Not in	● Not in
Scaleway	● Not in	● Not in	● Not in	● Not in	● Contender	● Not in
SoftwareONE	● Not in	● Contender	● Not in	● Contender	● Not in	● Not in
Sopra Steria	● Leader	● Leader	● Leader	● Leader	● Not in	● Not in
Stack Labs	● Not in	● Contender	● Not in	● Not in	● Not in	● Not in
TCS	● Product Challenger	● Not in	● Product Challenger	● Not in	● Not in	● Not in
Tech Mahindra	● Contender	● Not in	● Contender	● Not in	● Not in	● Not in
T-Systems	● Product Challenger	● Product Challenger	● Product Challenger	● Rising Star	● Not in	● Contender
Unisys	● Product Challenger	● Not in	● Product Challenger	● Not in	● Not in	● Not in
Wipro	● Product Challenger	● Not in	● Rising Star	● Not in	● Not in	● Not in



Public Cloud – Services & Solutions Quadrants



ENTERPRISE CONTEXT

Managed Public Cloud Services for Large Accounts

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

Enterprises are looking for service providers that are proficient in re-architecting and re-platforming of existing applications. In 2021, improving upon former lift-and-shift projects or refactoring existing models creates a market for public cloud managed services that provide cloud-native solutions, leveraging open-source solutions, containerization and serverless functions. In addition to modernization, this is driven by the urge to achieve cost efficiency. Cost efficiency usually means implementing a multicloud environment, which in turn needs cloud agnostic solutions that need to be managed at the highest transparency level.

Large enterprises are driven to move as many operations as possible to an automation-centric model for managing their multicloud environments. Automation will benefit the enterprises by leveraging their workforce as efficient as possible, and solutions include AIOps capabilities to monitor their infrastructure for proactive responses, predict the failures and reduce maintenance costs.

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

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

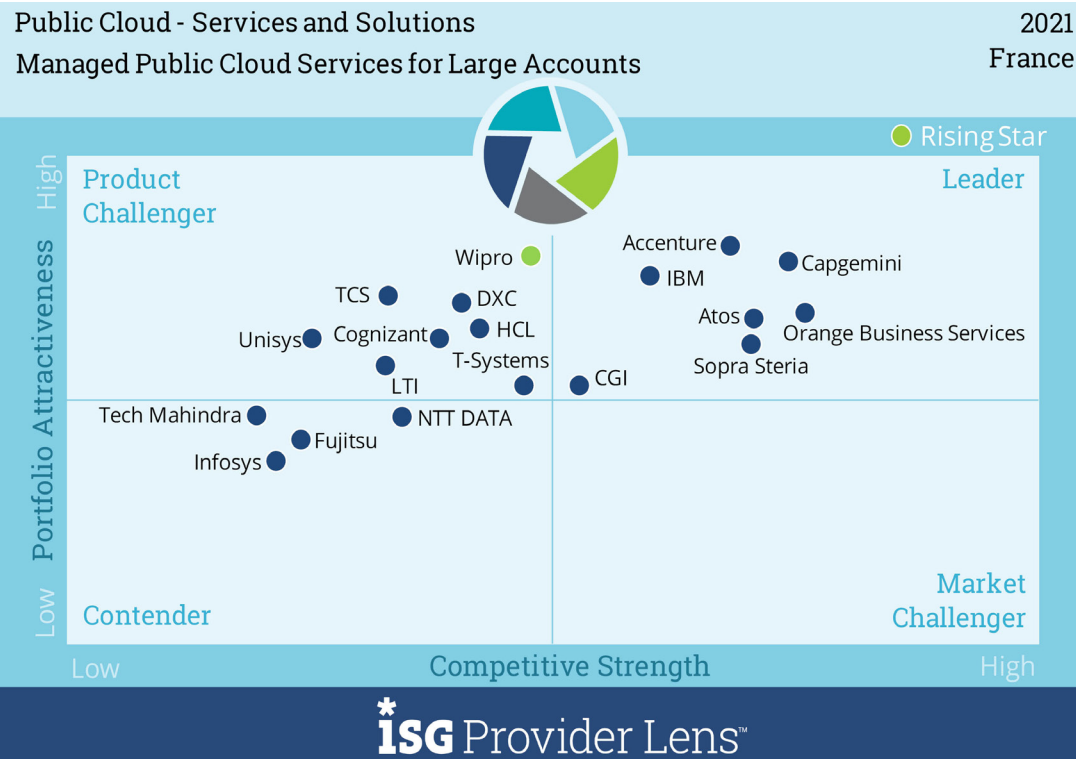
Software development and technology leaders should read this report to understand the positioning of managed service providers and learn how their offerings can impact ongoing development of enterprise software products.

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

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Definition

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



Source: ISG Research 2021

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Definition (cont.)

Broadly, these services include cloud services lifecycle management, real-time and predictive analysis, and monitoring and managing a customer's public and multicloud environment, with the aim to maximize the performance of workloads in the cloud, reduce costs and ensure compliance and security. Typically, specially developed or licensed cloud management platforms and tools are used to serve customers with maximum automation, and provide the necessary transparency on the managed cloud resource pool, in terms of capacity utilization and costs, including self-service administration. In addition to the technical services a provider offers dashboards to analyze and forecast financial impacts and propose optimization of the services.

Provider services typically include the following:

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

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Eligibility Criteria

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

Observations

The managed public cloud services market for large accounts has been gaining maturity and Managed service providers (MSP) are investing to improve the use of AI to support infrastructure automation. Most participants in this study have AIOps platforms in the support of infrastructure as code (IaC).

What differentiates service providers is no longer just the tools but the level of automation they can achieve. Even using the same software and tools, a service provider that invests in capturing events and logs to reinforce machine learning can achieve higher automation and develop predictive mechanisms that improve service quality.

The new hot topic in 2021 is financial operations (FinOps). An increasing number of companies are operating in multicloud environments and using more cloud services, thus increasing the complexity of cloud spending. Customers also want to understand who, in their organizations, are spending on cloud. The FinOps tools have emerged with the promise to simplify the accounting and assigning of cost to each cost center (chargeback), and demonstrate spending in detail (show back).

However, no FinOps tool offers all functions for all clouds. Service providers integrate several FinOps tools with analytic tools to account clients' cloud usage and spending and provide chargeback and show back reports.

MANAGED PUBLIC CLOUD SERVICES FOR LARGE ACCOUNTS

Observations (cont.)

Of the 46 service providers assessed in this study, 19 have qualified for this quadrant, of which seven were named as Leaders and one is a Rising Star.

- **Accenture** has long been operating in France. It acquired several companies in France to accelerate its cloud growth and offer local talents. Accenture has strategic partnership with the three top hyperscalers.
- **Atos** acquired Edifixio in 2020 — a top AWS service provider in France. The company had partnered with AWS, Google Cloud Platform and Microsoft Azure before the acquisition. It adds decarbonization, cybersecurity and data analytics to its managed cloud services offering.
- **Capgemini** offers a robust IT service management (ITSM) toolset, including managed cloud services. Its toolset integration provides clients with an end-to-end IT service platform, enabling Capgemini to oversee all infrastructure, from connectivity to security, and application performance.
- **CGI** is based in Canada, with global operations and a large footprint in France. The company's outsourcing service offering has evolved to include the public cloud. It leverages a robust service business with many years of experience in France.
- **IBM** offers managed services from its Global Technology Services division. In 2020, it announced a spinoff into a company, Kyndryl, which will include most of its Global Technology Services business. The new company is open for new partnerships. It offers IBM Cloud and partners with AWS, Google Cloud Platform and Microsoft Azure.
- **Orange Business Services** leverages the robustness of its parent company to deliver managed services to large enterprises. It offers the Orange Flexible Engine Cloud platform and partners with the top three hyperscalers, enabling it to fully cover the need for data sovereignty and compliance with strict regulations.
- **Sopra Steria** has been gradually increasing its public cloud services offering. It leverages a service platform that integrates with six hyperscalers and other local data centers, enabling it to provide cloud services to any client, including governments and companies under OIV and OSE classifications.
- **Wipro** (Rising Star) is a large global services company that recently named France as a primary focus area for growth. It offers a robust service platform that uses automation for everything, enabling high quality delivery and efficiency in managing clients' cloud infrastructures.

ORANGE BUSINESS SERVICES

Overview

Orange Business Services is a division of the Orange Group dedicated to IT services. It has more than 3,500 enterprise clients, globally. In 2018, Orange acquired Basefarm and its subsidiary, The Unbelievable Machine Company, to strengthen its capacity in Europe. Orange has more than 2,400 cloud experts and 3,900 AI, data and digital experts to deliver end-to-end cloud services.

Strengths

Robust growth in the cloud: Orange has been growing consistently with new clients, new cloud credentials and new alliances in 2020 and 2021. It is an AWS Advanced Consulting and MSP partner, Microsoft Azure partner and Azure Networking MSP, Google Cloud Platform Premier Partner and MSP, and OVHcloud partner. In addition, the Orange Flexible Engine Cloud platform supplements its offering, enabling clients to host their applications and data in France in accordance with their particular needs.

Alignment with key trends: Orange has aligned its portfolio around data services, AI analytics, compliance, security, IoT and 5G, providing clients a clear path into a future of IT services that run in the public cloud. It has been working with regulatory authorities in France for privacy, security and data sovereignty viability, with the aim to ensure the country's participation in global innovations.

Automation, scale and robustness: Orange leverages its parent company's robustness to rapidly scale its managed services capabilities. With full access to a broad ecosystem, Orange uses the best tools for AIOps and FinOps. It offers auto incident classification, assisted remediation, self-service with orchestrated workflows, predictive maintenance and capacity planning, service analytic dashboards and business intelligence reporting.

Caution

Orange offers a broad managed services portfolio distributed over the public cloud in partnership with hyperscalers and its 70 data centers for hybrid and private configurations. However, the market has been accelerating toward the public cloud. Orange should strengthen its partnerships with hyperscalers and acquire more diverse certifications to offer large accounts the opportunity to use Orange for all of their public cloud needs.



2021 ISG Provider Lens™ Leader

Orange offers clients a safe path into the future, providing leading edge technologies from a vast ecosystem that enables choices, compliance and security.

The image features a dark blue background with a light blue horizontal band at the top. On the left side, there are several circular icons resembling camera apertures, arranged in a diagonal line from the bottom left towards the center. These icons are in various shades of blue and white. The word "Methodology" is written in a white, serif font on the right side of the image.

Methodology

METHODOLOGY

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

The study was divided into the following steps:

1. Definition of the Public Cloud – Services & Solutions, France market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Use of ISG’s internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
 - Strategy & vision
 - Innovation
 - Brand awareness and presence in the market
 - Sales and partner landscape
 - Breadth and depth of portfolio of services offered
 - Technology advancements

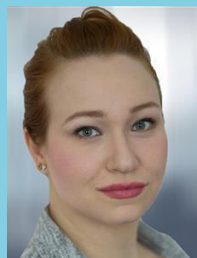


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