

# Multi Public Cloud Services

Consulting and Transformation Services for  
Large Accounts

A research report comparing provider strengths,  
challenges and competitive differentiators

Customized report courtesy of:



Executive Summary	03	<b>Consulting and Transformation Services for Large Accounts</b>	16 – 22
Provider Positioning	06	Who Should Read This Section	17
Introduction		Quadrant	18
Definition	12	Definition & Eligibility Criteria	19
Scope of Report	14	Observations	20
Provider Classifications	15	Provider Profile	22
Appendix			
Methodology & Team	24		
Author & Editor Biographies	25		
About Our Company & Research	27		

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### A year that enterprises are maturing their cloud expectations and optimizing outcomes

France continues to show accelerated cloud adoption, with a growing number of cloud providers, service partners and job openings. The market slowed down in 2022, with enterprises dedicating additional time to the planning and migration processes associated with cloud adoption. This year, ISG observes mature cloud decisions, taking into consideration data sovereignty and security.

Companies can modernize legacy applications by decoupling data, logic, and services and adopting multicloud solutions to combine sovereignty and innovation. Enterprises assessing service providers should consider their expertise to implement infrastructure as code (IaC) and refactor legacy applications to use cloud-native technologies, such as microservices, Kubernetes or other container technologies, APIs, serverless computing,

data lakes and low-cost cloud storage. It is not imperative to use all cloud-native technologies for all applications. Some end-of-life legacy applications are not worth refactoring or reengineering. Top service providers can guide clients on how to use cloud-native technologies wisely.

When modernizing and transforming to cloud, site reliability engineering (SRE) principles and practices offer the parameters to achieve high availability. It is commonly associated with quality and security, which are elements to consider in cloud architecture design. ISG has noticed an increasing number of service providers offering SRE as a core guideline for managed services and cloud architecture design.

The discussions around cloud sovereignty and data location regulations, initially perceived as negative and restrictive to cloud expansion, have gradually paved the way for more open-minded and flexible perspectives. Sovereign cloud is not stopping global cloud providers. Instead, the sovereign concept and current solutions enable market

The cloud has  
**eliminated the  
IT backlog**  
by facilitating  
users to **spend** on  
IT resources.



expansion by eliminating fear and uncertainty. Enterprises should plan for a best-of-breed approach, carefully choosing cloud providers to balance cost, compliance, performance and market differentiation.

Recently, ISG rolled out the Star of Excellence™ program, which is based on the voice of the customer concept. Here, providers are rated on six parameters, namely Service Delivery, Governance and Compliance, Collaboration and Transparency, Innovation and Thought Leadership, People and Culture Fit, and Business Continuity. The scores and data come from the Star of Excellence™ study that measures CX with providers based on direct client feedback. ISG found that the average provider CX score for the public cloud domain in Western Europe was 78.14 in 2022.

**In Consulting and Transformation Services for Large Accounts**, the market is growing at a moderate pace. Enterprises are more concerned with global economy uncertainties and prefer to assess cloud for short-term returns, focusing on cost management. Apparently, enterprises learned how to deal

with sovereign cloud concerns and regulations. Certain data sets reside on certified data centers, while masked data, anonymized data and non-confidential data can reside on any cloud. Some hyperscalers offer data location services, providing French clients with the tools to manage compliance, security and risk. ISG believes France-based enterprises will continue experimenting with hybrid cloud to accommodate data sovereignty, health regulations, GDPR, data location and the use of advanced AI solutions, such as generative AI, which are not currently supported on SecNumCloud infrastructures.

**In Consulting and Transformation Services for Midmarket**, most clients do not need SecNumCloud and sovereign cloud to operate. However, more hospitals, clinics and companies that handle patients' data are using cloud services, thus requiring data location and Health Data Hosting (HDS) certification. This research finds that local service providers are more concerned with developing consulting expertise around HDS than building a sovereign cloud. The international hyperscalers can easily meet HDS requirements, while getting

SecNumCloud certification is hardly possible for foreign cloud providers. This market will continue to use multicloud solutions, with data residing on HDS-certified infrastructure and applications that use cloud-native services from global hyperscalers.

### **The Managed Services for Large Accounts**

market demands advanced FinOps tools to manage enterprises' increasing cloud expenditure. All service providers offer AIOps, with task automation ranging from 40 to 70 percent. AIOps are behind self-service portals that empower business users or product owners responsible for agile development projects and digital products to launch additional cloud services, such as test environments, containers, and additional capacity to handle enterprise applications or e-commerce growth. The easy access to resources can lead to uncontrolled cloud spending. Complexity is increasing with the scale of operations, driving more vulnerabilities and chances of human errors. AIOps has become crucial for managing complexity, while FinOps is required to control the expanding cost of operations.

Companies that are considered Operators of Vital Importance (OVIs) require the SecNumCloud certification issued by the National Cybersecurity Agency of France (ANSSI). The enterprises dealing with patient data may require using HDS-certified data centers and service partners. The market has adapted and learned how to use multicloud solutions to promote security and compliance.

**In Managed Services for Midmarket**, MSPs offer AIOps and FinOps with commercial and open-source tools integrated with orchestration tools to deliver multicloud functionality. The midmarket clients are rarely impacted by data sovereignty regulations, with more demand for HDS because pharmacies, hospitals and clinics are midmarket companies with no plan to operate internationally. All hyperscalers have improved their partnership programs to attract new partners. However, many are small or independent software vendors (ISVs) that do not focus on managed services. The companies that qualify for this quadrant offer AIOps and minimum FinOps functionality to support clients' operations with automation and cost management.



### In the FinOps Services and Cloud Optimization

quadrant, ISG identifies service providers that excel in FinOps as a service. In this model, a service provider is responsible for developing the tagging strategy to better control IT spending and establish reporting mechanisms to demonstrate spending, governance and compliance. Leading service providers use advanced AI to identify anomalies in cloud usage and spending and propose architectural changes to improve performance and reduce costs. Service providers can implement new controls and avoid overspending.

### The Hyperscale Infrastructure and Platform Services


market slowed down but still maintains a double-digit annual growth rate. The regulations around data sovereignty, data location and health data services (HDS) have matured in France. However, IaaS and PaaS providers in Europe do not offer the same portfolio breadth and depth that global providers can deliver. SecNumCloud certification is restricted to companies headquartered in the eurozone, limiting the

number of offerings. Consequently, clients are increasingly opting for multicloud solutions, allowing them to host data in one location and use services from the best source.

**The SAP HANA Infrastructure Services** market is highly competitive. SAP continues to push clients to migrate legacy ERPs to SAP S/4HANA, with a strong focus on public clouds. SAP Cloud offers shared SAP solutions (SaaS), and clients interested in SAP S/4HANA private edition are more inclined to migrate their ERP to public clouds. Clients should assess IaaS performance when choosing their preferred cloud infrastructure provider. Instances optimized for SAP HANA vary by cloud region. Some hyperscalers offer more and better tools to manage SAP operations, backup and upgrades. Network latency, security tools and automation also differ by hyperscaler.


Complexity is increasing with the scale of operations, driving more vulnerabilities and chances of human errors. AIOps has become crucial for managing complexity, while FinOps is required to control the expanding cost of operations.



 Provider Positioning


	Consulting & Transformation Services Large Accounts	Consulting & Transformation Services Midmarket	Managed Services for Large Accounts	Managed Services for Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure & Platform Services	SAP HANA Infrastructure Services
3DS OUTSCALE	Not In	Not In	Not In	Not In	Not In	Contender	Not In
Accenture	Leader	Not In	Leader	Not In	Leader	Not In	Not In
Alibaba	Not In	Not In	Not In	Not In	Not In	Contender	Not In
Atos	Not In	Not In	Market Challenger	Not In	Not In	Not In	Not In
AWS	Not In	Not In	Not In	Not In	Not In	Leader	Leader
Axians	Contender	Not In	Contender	Not In	Not In	Not In	Not In
Bechtle	Not In	Contender	Not In	Product Challenger	Not In	Not In	Not In
Be-Cloud	Not In	Contender	Not In	Contender	Not In	Not In	Not In
BSO	Not In	Contender	Not In	Contender	Not In	Not In	Not In



 Provider Positioning

	Consulting & Transformation Services Large Accounts	Consulting & Transformation Services Midmarket	Managed Services for Large accounts	Managed Services for Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure & Platform Services	SAP HANA Infrastructure Services
Capgemini	Leader	Not In	Leader	Not In	Leader	Not In	Not In
CGI	Product Challenger	Not In	Contender	Not In	Not In	Not In	Not In
Claranet	Not In	Leader	Not In	Leader	Not In	Not In	Not In
Cloud Temple	Not In	Product Challenger	Not In	Product Challenger	Contender	Not In	Not In
Cognizant	Product Challenger	Not In	Contender	Not In	Not In	Not In	Not In
Corexpert	Not In	Contender	Not In	Not In	Not In	Not In	Not In
Crayon	Not In	Contender	Not In	Contender	Not In	Not In	Not In
Devoteam	Not In	Leader	Not In	Leader	Not In	Not In	Not In
DoiT	Not In	Contender	Not In	Contender	Not In	Not In	Not In




 Provider Positioning

	Consulting & Transformation Services Large Accounts	Consulting & Transformation Services Midmarket	Managed Services for Large Accounts	Managed Services for Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure & Platform Services	SAP HANA Infrastructure Services
DXC Technology	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In
Ecritel	Not In	Contender	Not In	Product Challenger	Not In	Not In	Not In
Eviden	Leader	Not In	Product Challenger	Not In	Leader	Not In	Not In
Fujitsu	Contender	Not In	Contender	Not In	Not In	Not In	Not In
Google	Not In	Not In	Not In	Not In	Not In	Product Challenger	Market Challenger
HCLTech	Leader	Not In	Leader	Not In	Leader	Not In	Not In
Hitachi Digital Services	Contender	Not In	Not In	Not In	Not In	Not In	Not In
IBM	Product Challenger	Not In	Not In	Not In	Not In	Product Challenger	Contender
Inetum	Contender	Not In	Contender	Not In	Not In	Not In	Not In





 Provider Positioning

	Consulting & Transformation Services Large Accounts	Consulting & Transformation Services Midmarket	Managed Services for Large Accounts	Managed Services for Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure & Platform Services	SAP HANA Infrastructure Services
Infosys	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In	Not In
IONOS	Not In	Not In	Not In	Not In	Not In	Contender	Not In
Kyndryl	Rising Star ★	Not In	Leader	Not In	Product Challenger	Not In	Not In
LTIMindtree	Product Challenger	Not In	Rising Star ★	Not In	Product Challenger	Not In	Not In
Microsoft	Not In	Not In	Not In	Not In	Not In	Leader	Leader
NTT DATA	Contender	Not In	Contender	Not In	Not In	Not In	Not In
Oracle	Not In	Not In	Not In	Not In	Not In	Product Challenger	Not In
Orange Business	Leader	Leader	Leader	Leader	Not In	Product Challenger	Contender
OVHcloud	Not In	Not In	Not In	Not In	Not In	Leader	Product Challenger




## Provider Positioning

Page 5 of 6

	Consulting & Transformation Services Large Accounts	Consulting & Transformation Services Midmarket	Managed Services for Large Accounts	Managed Services for Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure & Platform Services	SAP HANA Infrastructure Services
oXya	Not In	Leader	Not In	Market Challenger	Not In	Not In	Contender
Randstad Digital (Ausy)	Not In	Rising Star ★	Not In	Contender	Not In	Not In	Not In
Reply	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
SAP	Not In	Not In	Not In	Not In	Not In	Not In	Product Challenger
ScaleSquad	Not In	Leader	Not In	Leader	Contender	Not In	Not In
Scaleway	Not In	Not In	Not In	Not In	Not In	Product Challenger	Not In
SCC	Not In	Product Challenger	Not In	Product Challenger	Not In	Not In	Not In
Sigma	Not In	Product Challenger	Not In	Contender	Not In	Not In	Not In
SoftwareOne	Not In	Contender	Not In	Product Challenger	Not In	Not In	Not In



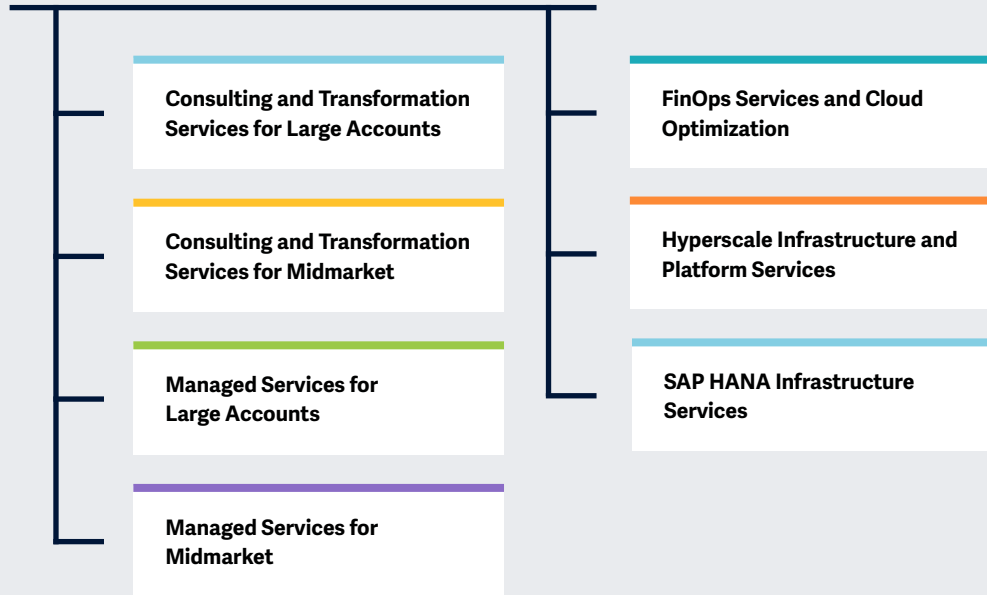
 Provider Positioning

	Consulting & Transformation Services Large Accounts	Consulting & Transformation Services Midmarket	Managed Services for Large accounts	Managed Services for Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure & Platform Services	SAP HANA Infrastructure Services
Sopra Steria	Leader	Not In	Leader	Not In	Contender	Not In	Not In
Stack Labs	Not In	Contender	Not In	Not In	Not In	Not In	Not In
TCS	Leader	Not In	Leader	Not In	Product Challenger	Not In	Not In
Tech Mahindra	Contender	Not In	Contender	Not In	Not In	Not In	Not In
T-Systems	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Contender	Contender
Wipro	Leader	Not In	Leader	Not In	Product Challenger	Not In	Not In



# This study focuses on what ISG perceives as most critical in 2023 for **Multi Public Cloud Services**.

Simplified Illustration; Source: ISG 2023



## Definition

This study assesses providers offering public cloud services, including consulting and transformation, managed services, public cloud infrastructure, FinOps and other services. Providers in scope leverage automation tools to effectively manage, secure and optimize public cloud infrastructure.

In recent years, there has been rapid growth in public cloud adoption as part of digital transformation engagements. The many benefits of the public cloud surpass on-premises infrastructure in several ways, making it the preferred choice for greenfield infrastructure operations and application development in most cases. Other key reasons for this preference stem from a heightened focus on cybersecurity, a greater push toward IT cost optimization and operational efficiency, and the increased deployment of automation tools for efficient data management, along with driving sustainability initiatives by leveraging cloud infrastructure.



Enterprises continue to seek strategic providers that facilitate cloud transformation engagements on major hyperscalers such as AWS, Microsoft Azure and Google Cloud. The service providers will not only continue to manage the workloads on an ongoing basis but also assist enterprises in controlling, optimizing and managing cloud expenses through FinOps strategies.

With enterprises realizing that the lift and shift migration strategy does not provide the benefits expected from public cloud, they are on the lookout for providers that can help accrue the complete potential of cloud technology. With this, we will be seeing an increased demand for re-architecting workloads and leveraging cloud-native technologies for their migration engagements. Also, in the coming years, enterprises are likely to take a conservative approach to spending on public cloud infrastructure. The increasing adoption of the FinOps strategy will support this approach and enable the optimization of cloud resources and, consequently, reduce cloud consumption and cloud bills.



### Scope of the Report

This ISG Provider Lens™ quadrant report covers the following seven quadrants for services/solutions: Consulting and Transformation Services for Large Accounts, Consulting and Transformation Services for Midmarket, Managed Services for Large Accounts, Managed Services for Midmarket, FinOps Services and Cloud Optimization, 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 (quadrants)
- Focus on the regional market

ISG studies serve as the basis for important decision-making by covering providers' 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 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 \$20 million and \$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 \$1 billion, with activities worldwide and globally distributed decision-making structures.
- **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).

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 service providers that ISG believes have strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.





**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.

**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.

★ **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.





# Consulting and Transformation Services for Large Accounts



### Who Should Read This Section

This report is relevant to large enterprises in France that are evaluating consulting and transformation service providers in the multi public cloud environment. In this quadrant, 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.

Enterprises in France face problems like global economy uncertainties, workload assessment, change management, the shortage of talented specialists and ambiguities about the integration of existing infrastructure. The focus on moving workloads to public clouds continued in France, with digital transformation initiatives gaining momentum in enterprises.

Enterprises are focusing on optimizing cloud governance in the areas of cost and resource management and cloud-native service development. Hence, they are also interested in knowing providers' ESG commitment and practical outcomes. ISG foresees that France-based enterprises will continue

experimenting with hybrid clouds to accommodate data sovereignty, healthcare regulations, GDPR, data localization and the adoption of cutting-edge AI solutions. Notably, these AI innovations, such as generative AI, currently face limitations in compatibility with SecNumCloud infrastructures.

Enterprises should evaluate service providers' expertise in implementing infrastructure as code (IaC) and modernize legacy applications to use cloud-native technologies, such as microservices, Kubernetes or other container technology, APIs, serverless computing, data lakes and low-cost storage. The migration frameworks allow for the smooth migration of substantial workloads within shorter cycles, consequently minimizing disruptions to regular business operations.



**IT leaders** should read this report to better understand the relative strengths and weaknesses of consulting and transformation service providers and how they can help drive digital transformation.



**Software development and technology leaders** should read this report to understand the positioning of consulting and transformation service providers and how their offerings can impact ongoing transformation.

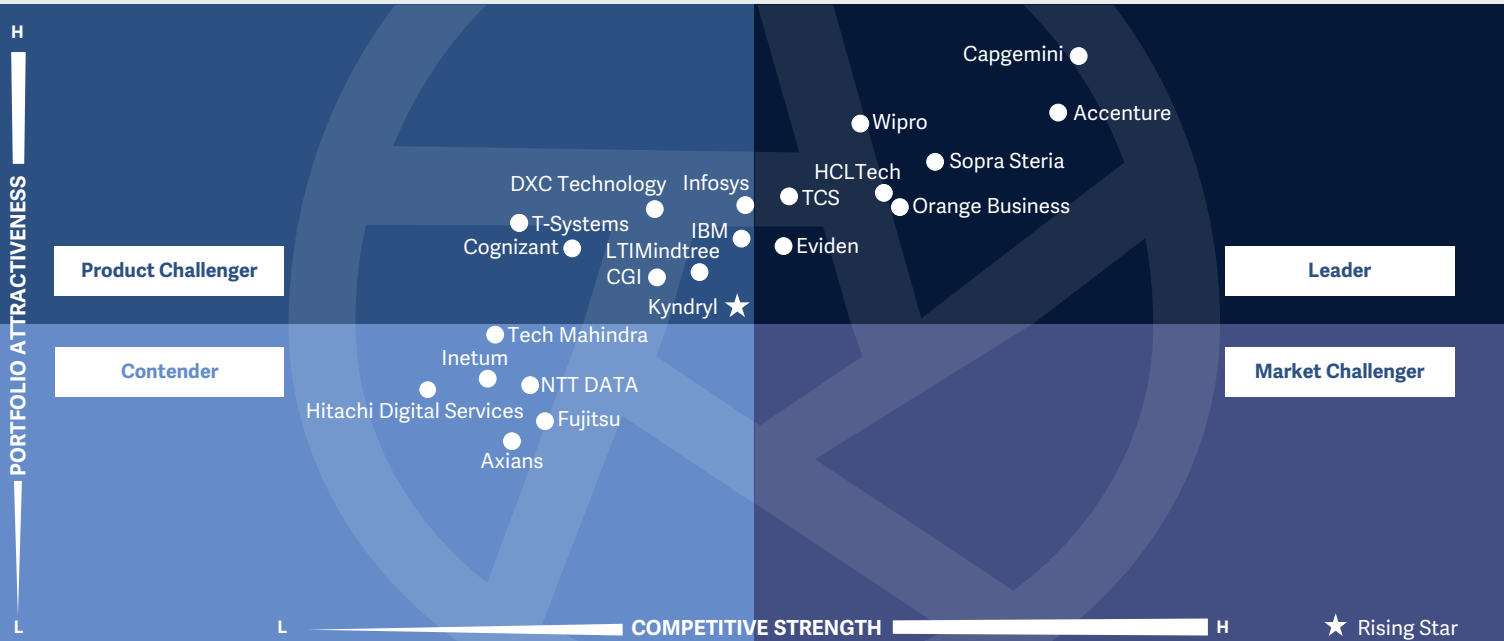


**Sourcing, procurement and vendor management professionals** should read this report to better understand the current landscape of consulting and transformation service providers in France.



**Multi Public Cloud Services**  
**Consulting and Transformation Services for Large Accounts**

France 2023



This quadrant assesses providers of consulting services to **migrate** applications to public clouds and transform **large account** infrastructures to modern digital platforms.

*Pedro L. Bicudo Maschio*



## Consulting and Transformation Services for Large Accounts

### Definition

This quadrant assesses service providers that offer public cloud consulting and transformation services. These service providers partner with multiple public cloud infrastructure providers to offer multicloud strategy and industry cloud solutions and manage customer-specific complexities in adopting and deploying public cloud solutions. These providers have highly skilled developers and software architects that use design thinking and short work cycles to meet customer demands. This quadrant evaluates providers that help enterprises modernize, optimize and transform their IT operations to enhance efficiency, agility and security. Provider services typically comprise:

- **Consulting services** include business case design for multicloud environments and workload migration assessments. Service providers offer transformation roadmaps addressing security tools, networking and connectivity, data services, analytics, computing performance and guidance on application modernization for migration to public clouds.
- **Transformation services** include cloud architects and engineers designing, building and configuring multicloud environments. They also support migrating and integrating applications to harness cloud computing security. They introduce AIOps and FinOps to enable an advanced infrastructure that facilitates cloud-native application development and operations.
- **Compliance services** include environmental, sustainability and governance (ESG) and security requirements. Providers use best practices and frameworks to design cloud policies, processes and functions, ensuring healthy, sustainable, secure and compliant environments regardless of location. From a CXO perspective, ESG has become a mainstream requirement, making it an integral part of every transformation engagement.

### Eligibility Criteria

1. Capable of **assessing and designing application modernization** strategies to adopt cloud-native services and API libraries for service integration, including **DevOps automation, AIOps** and infrastructure as code (**IaC**) deployments, and cross-cloud integration
2. **Methods and frameworks** to analyze clients' IT landscape, optimize IT spending and prevent additional technical debts
3. Experience in **planning and implementing multicloud** services for major industry verticals
4. Experience in **application migration** (templates, automation engines and other techniques) and cloud-native application development
5. **Certified competence** in at least two hyperscalers (preferably AWS, Azure and Google Cloud)
6. **Ability to address ESG** in large transformation programs, helping clients in drafting carbon-neutral strategies and understanding the benefits of adopting a green strategy



## Consulting and Transformation Services for Large Accounts

### Observations

Cloud transformations continue to evolve in France at a moderate pace compared to the previous year. Enterprises are evaluating their options more carefully, focusing on cost savings and cloud optimization.

A few cloud providers offer SecNumCloud — a certified cloud infrastructure compliant with French regulations. The investment required to certify SecNumCloud diminishes cloud providers' interest in participating because the certificate has no value outside France. In contrast, global hyperscalers offer more advanced cloud services that the few SecNumCloud-certified providers cannot deliver.

The market will continue experimenting with hybrid cloud to accommodate data sovereignty, health regulations, GDPR, data location and advanced AI solutions, such as generative AI. Enterprises should plan for a best-of-breed approach, choosing cloud providers accordingly.

From a cloud migration point of view, enterprises should assess service providers' expertise to implement infrastructure as code (IaC) and refactor legacy applications to use cloud-native technologies, such as microservices, Kubernetes or other container technology, APIs, serverless computing, data lakes and low-cost storage. It is not imperative to use all technologies with all applications. Instead, a leading service provider will guide clients to enable cloud-native technologies and use them wisely.

From the 51 companies assessed for this study, 22 have qualified for this quadrant, with eight being Leaders and one a Rising Star.

### accenture

**Accenture** has an extensive presence in France, enabling it access to large enterprises across the country. Its Cloud First portfolio covers all three major hyperscalers with innovative solutions and a strong application modernization focus.

### Capgemini

**Capgemini** is the largest IT organization in France, providing massive scale to deploy innovation and comprehensive cloud services. It partners with top hyperscalers in addition to local partners to offer SecNumCloud options.

### Eviden

**Eviden** is the new brand after Atos. The company separation was completed in October. It offers end-to-end cloud services, from application modernization to cloud operations. It partners with top hyperscalers and is investing to expand its certifications.

### HCLTech

**HCLTech** has been expanding by winning deals in Europe, providing it with a more robust footprint in France this year. It uses a feature-rich toolset with AI and analytics to automate cloud assessments and migrations.



**Orange Business** supports thousands of large enterprises, offering an integrated portfolio comprising networking, 5G, edge computing and public cloud, with strong partnerships with hyperscalers and sovereign cloud expertise.

### Sopra Steria

**Sopra Steria** offers many cloud-certified experts and partners with AWS, Azure, Google Cloud, IBM Cloud and Oracle Cloud — the most extensive portfolio — besides OVHcloud and regional enterprise cloud partners. It offers many options for enterprises.



**TCS** uses extensive automation on a robust service platform to support a fabric approach. It partners with top hyperscalers and has many certified practitioners. It combines local and global capacity to support large enterprises.



## Consulting and Transformation Services for Large Accounts



**Wipro** has a global service platform with end-to-end automation, providing seamless services in every country. Its fabric approach benefits cloud efficiency and elasticity to accommodate growth.

### Kyndryl

**Kyndryl** (Rising Star) has doubled its cloud certifications in the last year while extending its portfolio by adding Oracle Cloud to its Google Cloud, AWS, Azure and IBM Cloud ecosystem. The company is investing to become a strong leader in multicloud.





“Orange Business delivers future-proof cloud solutions, balancing performance, cost, compliance and security. It integrates major public clouds with SecNumCloud to address French regulations while keeping enterprises competitive at a global level.”

*Pedro L. Bicudo Maschio*

# Orange Business

## Overview

Orange Business is headquartered in Paris, France and operates in 65 countries. It has more than 29,100 employees across 100 global offices. In FY22, the company generated \$7.9 billion in revenue.

The company has more than 3,300 large clients in France and over 1,700 cloud certifications on AWS, Azure, Google Cloud and OVHcloud.

Orange Business has five major service centers, 17 security operating centers and more than 70 data centers on five continents, including three data centers dedicated to Orange Flexible Engine, Cloud Avenue and VMware sovereign cloud.

## Strengths

**Business performance focus:** Orange Business helps clients define a digital cloud strategy to create differentiation, reduce costs and monetize data. It provides knowledge and technical support, with data sovereignty and regulatory compliance guidance backed by security experts. The company adds innovation and cloud-native technologies.

**Complete offering:** Orange Business’ framework includes hyperscalers’ best practices and advanced networking tools to support clients across France and internationally. It also guides clients to develop their culture and skills to exploit cloud business value, co-creating future-proof cloud solutions to elevate clients’ competitiveness and support business growth.

## More public cloud options:

Orange Business prioritizes clients’ workload migrations to public cloud partners, including SecNumCloud. It also offers the OpenStack-based public cloud Flexible Engine, and it is in the process of obtaining SecNumCloud for its VMware-based Cloud Avenue. The company’s cybersecurity, 5G, edge computing and data analytics portfolio enables it to deploy custom combinations of private, public and hybrid cloud solutions.

## Caution

Orange Business has a stronger position in Europe compared to its footprint in the Americas and Asia. Enterprises with a global scale should assess their service support availability to meet specific needs outside France and continental Europe.





# Appendix

The ISG Provider Lens™ 2023 – Multi Public Cloud Services report 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 November 2023, 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 Multi Public Cloud 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



**Pedro L. Bicudo Maschio**  
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Distinguished analyst and author, Pedro Maschio brings extensive experience in the research of the SEMEA (Southern Europe Middle East and Africa) and the Americas 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.

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**Manoj M**  
**Research Analyst**

Manoj is a research analyst at ISG and supports ISG Provider Lens™ studies on Private/Hybrid Cloud – Data Center Services, Mainframes, Cloud Native Services & Solutions and Public Cloud Solution and Services. He also supports the lead analysts of multiple regions in the research process. Prior to this role, he supported the ROI process in sales intelligence platform and was an individual contributor in handling research requirements for advanced technologies in different sectors.

He has considerable expertise in predicting the automation impact by considering certain parameters such as productivity, efficiency and time reduction. During his tenure, he has supported research authors and authored Enterprise Context and Global Summary reports with market trends and insights.





*IPL Product Owner*

**Jan Erik Aase**  
**Partner and Global Head – ISG Provider Lens™**

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

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



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**REPORT: MULTI PUBLIC CLOUD SERVICES**