

Multi Public Cloud Services

Managed Services for Large Accounts

A research report comparing provider strengths,
challenges and competitive differentiators

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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

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	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 ccounts	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

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	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



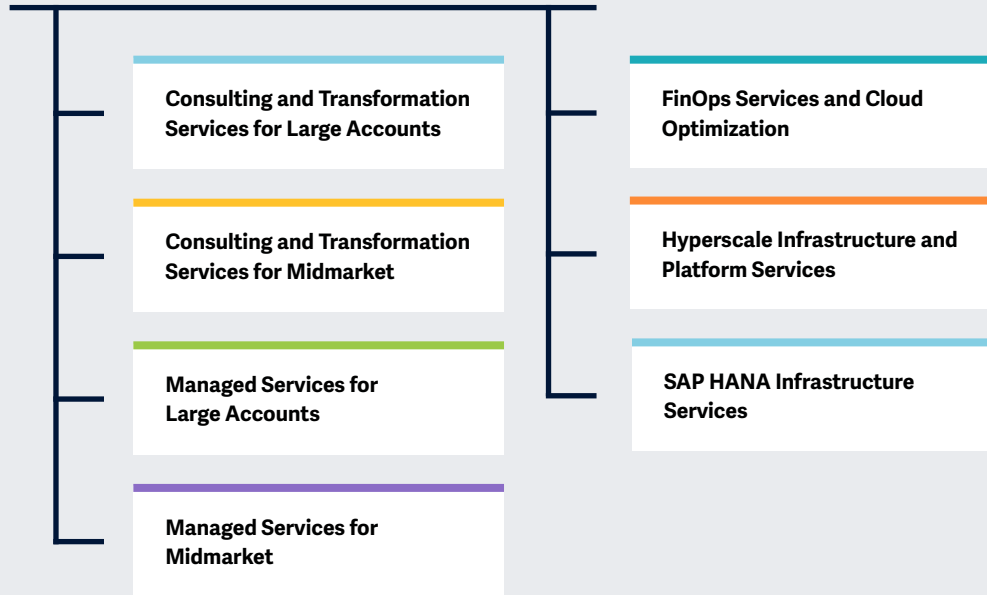
 Provider Positioning

	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.





Managed Services for Large Accounts

Managed Services for Large Accounts

Who Should Read This Section

This quadrant is relevant to large enterprises in France that are evaluating public cloud managed service providers (MSPs). 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. Service providers are managing client workloads on third-party, public cloud and hyperscale environments, enabling enterprises to focus on other tasks.

Enterprises face challenges in managing the complexity of multicloud environments, contending with raising concerns around utilization, cost and compliance. They also focus on using governance tools to manage access rights, assure data sovereignty and comply with government regulations for effective cloud implementation and management. To keep the budget in compliance with enterprise regulations, service providers are focusing on enhancing FinOps offerings that can generate alerts or provide recommended corrections for cloud usage.

Enterprises in France are emphasizing automation-enabled managed services with AIOps, MLOps, data lakes, serverless computing, IaC and containers. In recent times, service providers have accommodated continuous integration and continuous delivery (CI/CD) pipeline automation, DevOps and container management. ISG observes an increasing number of service providers offering site reliability engineering (SRE) as a core guideline for managed services and cloud architecture design.

In France, enterprises are increasingly seeking assistance with application modernization and the implementation of cloud-native applications to facilitate agile development at a larger scale.



IT leaders should read this report to better understand the relative strengths and weaknesses of MSPs and how their approaches can influence enterprise public cloud strategies, business agility and the TCO.



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

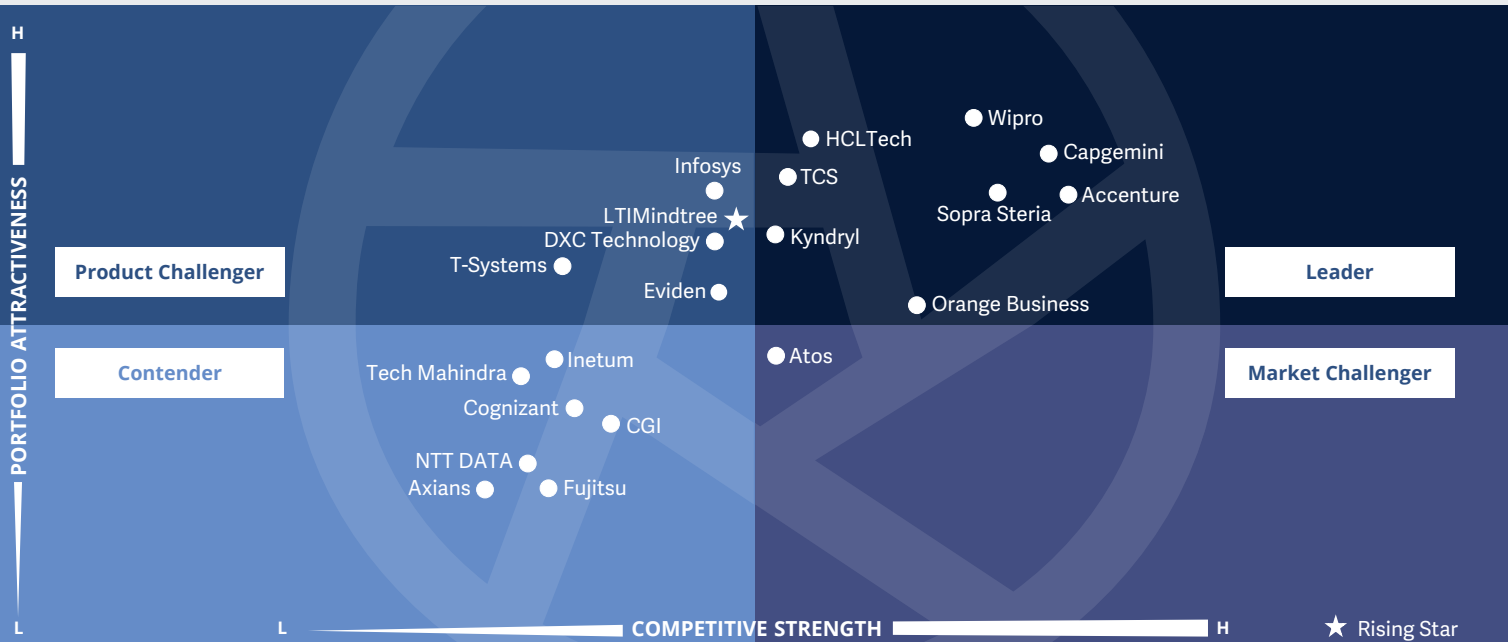


Sourcing, procurement and vendor management professionals should read this report to better understand the current landscape of MSPs in France.



**Multi Public Cloud Services
Managed Services for Large Accounts**

France 2023



This quadrant assesses managed service providers (**MSPs**) that are capable of supporting the complexities, security and compliance requirements of **large enterprise clouds**.

Pedro L. Bicudo Maschio



Managed Services for Large Accounts

Definition

This quadrant assesses managed service providers specializing in multicloud environments, comprising AWS, Microsoft Azure, Google Cloud and other hyperscalers. These providers adopt a DevOps-centric approach to support robust CI/CD pipelines with strong container management capabilities. They also offer expertise in site reliability engineering (SRE) and business resiliency.

Typical managed services offered by these providers include cloud infrastructure lifecycle management and real-time multicloud monitoring with predictive analytics to maximize performance, reduce costs and ensure compliance and security. Service providers use AIOps and FinOps tools to automate processes and provide transparency on cloud resources, capacity utilization and costs. Typical service platforms include service catalogs, approval workflows, self-service and self-heal capabilities. Provider services comprise:

- Management and monitoring of virtual machine CPU utilization, memory, database performance, storage, microservices, containers, logs and service agents
- Upgrade services for the operating system, middleware and applications on public cloud infrastructure
- Multicloud management, including patching and upgrading for the operating system, middleware and applications, plus security patching, access control and identity management
- ITSM, including incident management, problem management and release management, and configuration management database (CMDB) management
- FinOps monitoring and reporting, covering resource utilization, multicloud billing aggregation, invoice management, chargeback and showback
- ML and predictive analytics to improve performance and security
- Self-service catalogs that automate provisioning, container management, service on/off scheduling, IaC and DevOps automation
- Governance and compliance management, along with a robust cybersecurity framework to safeguard client data in multiple geographic locations

Eligibility Criteria

1. **Operational excellence** and well-defined professional services
2. Experience in building and **managing public and multicloud** environments
3. Expertise in managing **platform configuration, integration,** systems and **containers**
4. Financial dashboards and cost analysis tools for enhanced **visibility of variable costs** associated with cloud providers through the FinOps ecosystem
5. Support for software code development and **cloud-native and legacy system integration** by leveraging DevOps, API-enabled automation and cloud analytics services
6. **Robust security posture and cloud governance** services
7. **Partnerships with leading public cloud providers** and relevant managed service provider certificates for AWS, Microsoft Azure, Google Cloud, and others
8. Industry-specific solutions and **practice knowledge** for managing workloads on public cloud infrastructure



Managed Services for Large Accounts

Observations

Managed service providers (MSPs) continue to invest in improving AI capabilities within their AIOps tooling and financial operations (FinOps). Every provider in this quadrant offers a certain automation level, ranging from 40 to 70 percent task automation. Cloud-certified MSPs go through a strict certification process that ensures they can provide high-grade automation and cloud integration.

Minimum services include infrastructure as code (IaC) to enable self-service to application development teams, such as creating a new environment, launching a container, creating a test environment with production data, and many other automation. However, service improvements in this area include data masking, privacy protection, data encryption, access control, security inspection and configuration management. In practical terms, these services are combined into continuous integration and continuous delivery (CI/CD) pipeline automation, DevOps and container management.

Complexity increases with the scale of operations, which increases the number of vulnerabilities and human error probabilities. AIOps has become essential for managing complexity, while FinOps is required to control the expanding cost of operations.

Large accounts may require SecNumCloud — a certification issued by the National Cybersecurity Agency of France (ANSSI) to improve protection for public authorities and Operators of Vital Importance (OVIs) — and those dealing with patient data may require using health data hosting (HDS)—certified data centers. Enterprises should check their compliance needs to choose their cloud service partner accordingly.

From the 51 companies assessed for this study, 21 have qualified for this quadrant, with eight being Leaders and one a Rising Star.

accenture

Accenture leverages proprietary automation tools to integrate complex cloud infrastructures. It offers AIOps and FinOps functionality with custom configurations. The company's mature IT processes favor comprehensive cloud governance models.



Capgemini has a service integration platform with advanced automation to handle complexity and scale. It developed advanced FinOps functionality integrated into its robust portfolio, providing end-to-end managed services.

HCLTech

HCLTech invests in developing proprietary service platforms that integrate with leading commercial software. Its AI expertise enables the development of advanced AIOps and FinOps tools, providing clients with state-of-the-art cloud management.

Kyndryl

Kyndryl has long been a leader in managed services. It has transformed its service platform into Kyndryl Bridge, providing one of the most comprehensive portfolios that can cover mainframes, legacy operating systems, ERPs and modern cloud-native workloads.



Orange Business differentiates itself by offering networking and edge computing integrated with AIOps and FinOps. It partners with the top three hyperscalers and offers three proprietary clouds to address hybrid cloud needs.

Sopra Steria

Sopra Steria has more cloud partner options, allowing it to serve clients in the public sector and comply with requirements from OVIs and participants in the healthcare ecosystem. The company has many cloud-certified practitioners and a robust AIOps platform.



Managed Services for Large Accounts



TCS uses proprietary and commercial software for AIOps and FinOps. It is one of the largest partners of the top three hyperscalers. The company's fabric approach delivers seamless services across geographies.



Wipro takes a fabric approach with AIOps and FinOps to deliver consistent services. It uses advanced AI analytics to provide cloud optimization insights and maintain streamlined operations for maximum efficiency.



LTI Mindtree (Rising Star) uses advanced automation over a comprehensive service portfolio. It has gained new deals in France and continues to expand operations. The company focuses on client outcomes and quality services.





“Orange Business complements its public cloud scale with advanced networking and security, enabling end-to-end infrastructure operations with top compliance and efficient services.”

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

Compliance and sovereignty: Orange Business provides software-defined data center (SDDC) and software-defined networking (SDN), enabling full infrastructure virtualization. It ensures clients' security with 17 security operation centers. Orange Business helps clients set their cloud policies and data location services to comply with French regulations. The company is in the process of obtaining SecNumCloud for its Cloud Avenue infrastructure.

Scale of operations: Orange Business has more than 2,600 cloud experts and over 1,700 cloud certifications. It uses a robust service platform with AIOps functionality, including self-service catalogs, auto provisioning, self-heal and container management. Cloud-native tools support reliable application

performance, faster release times, efficiency and superior CX. Its robust management platform supports clients' growth.

Trusted partner: Orange Business' broad ecosystem and pervasive network allow clients to operate in many cloud regions with low-latency connectivity, providing high availability and business resilience. The company manages everything, from fiber-optic supporting the network to data access control.

Caution

Orange Business could improve its portfolio attractiveness by elevating its AWS partnership to the Premier level and obtaining Microsoft MSP certification. These titles do not impact its delivery capacity, but higher certification levels require more investments in training, showing a stronger commitment to hyperscalers.





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
Lead Analyst

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.

Enterprise Context and Overview Analyst



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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