ISG Provider Lens™

Multi Public Cloud Services

Managed Services for Midmarket

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

orange™ Business Services

QUADRANT REPORT | DECEMBER 2023 | FRANCE

Table of Contents

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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, whileFinOps 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

Page 1 of 6

	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
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

Page 2 of 6

	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
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

Page 3 of 6

	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
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

Page 5 of 6

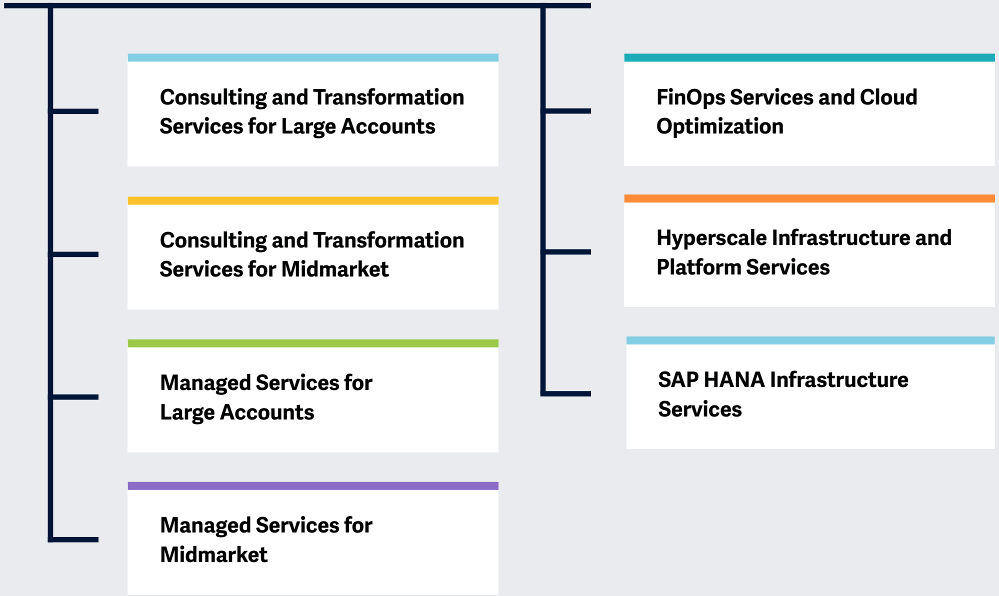
	Consulting & Transformation Services Large Accounts	Consulting & Transformation Services Midmarket	Managed Services for Large ccounts	Managed Services for Midmarket	FinOps Services and Cloud Optimization	Hyperscale Infrastructure & Platform Services	SAP HANA Infrastructure Services
oXya	Not In	Leader	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

Page 6 of 6

	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
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.

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.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

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

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

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 Midmarket

Who Should Read This Section

This quadrant is relevant to midsize 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 midsize 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.

Midsize enterprises are embracing a few complex requirements in terms of cost and spending in smaller-scale projects compared to large enterprises. Data residency and governance are some of the critical aspects to address during the process of enterprise transformation.

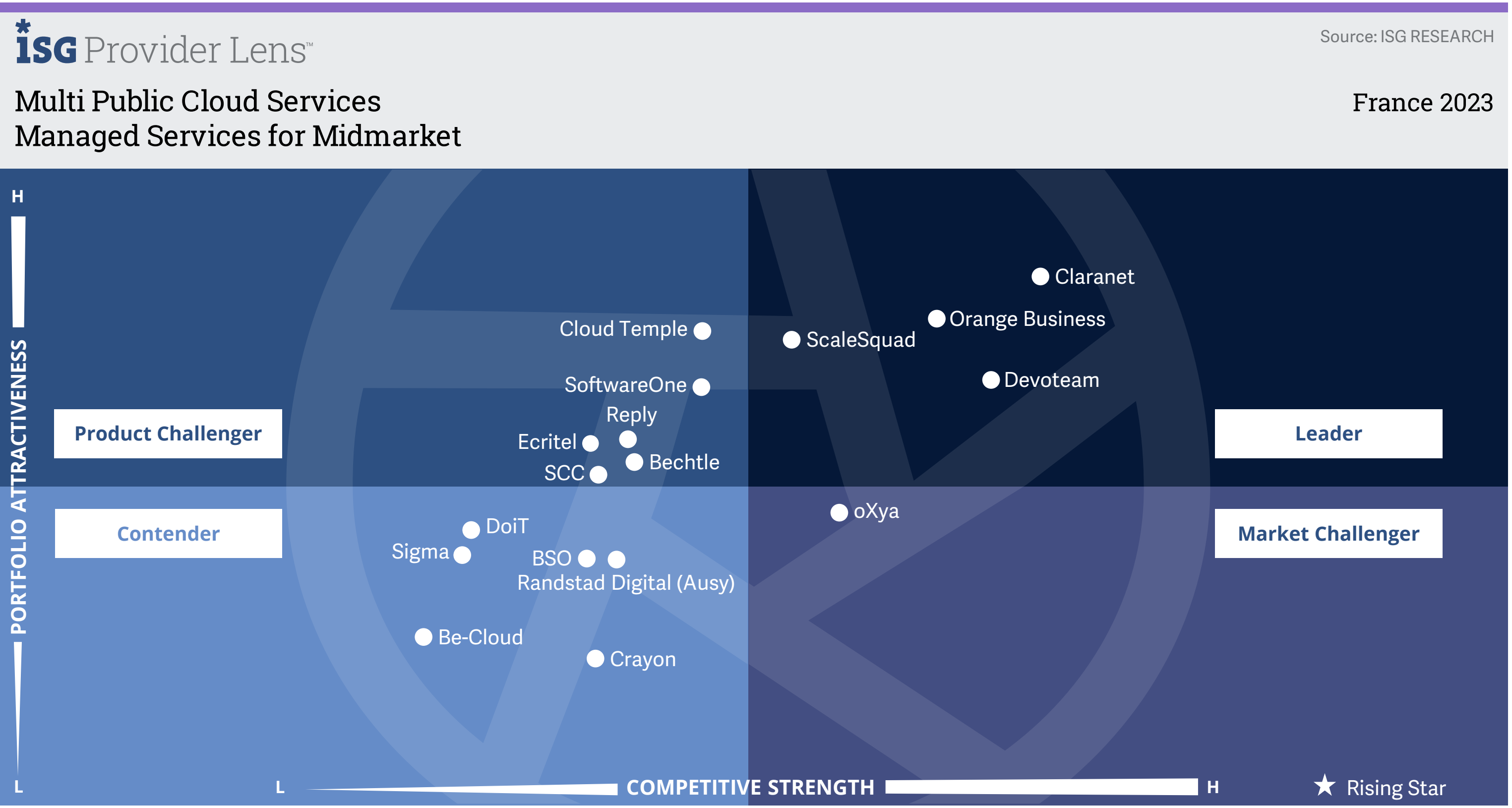
Enterprises in France are emphasizing provider capabilities in application modernization, AIOps, FinOps, governance, compliance and security with high integration capabilities. They focus on advanced services, including test environments with masked production data, continuous integration and continuous delivery (CI/CD) pipeline automation, and DevOps automation. Using managed public cloud services can help enterprises implement cloud-native solutions by leveraging containers and serverless functions that eliminate or reduce server utilization hours and database size.

Enterprises focus on leveraging cloud architecture advice to explore consolidation and upgrades that promote performance and cost savings throughout the cloud implementation journey. Hence, midsize enterprises can gain advantages from a diverse set of MSPs offering industry-specific automation, infrastructure monitoring and cost-effective multicloud solutions.

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.



This quadrant assesses managed service providers **(MSPs)** that support two or more public clouds, providing automation and value-added services for enterprise **clients in the midmarket.**

Pedro L. Bicudo Maschio

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

Observations

MSPs focused on midmarket clients offer AI for IT operations (AIOps) and financial operations (FinOps) with commercial and open-source tools. Some service providers have proprietary platforms to integrate tools and orchestrate multicloud information.

Cloud environments need infrastructure as code (IaC) to enable efficient operations. Common self-service catalogs include provisioning virtual servers, databases and cloud storage. Advanced services include pre-configured containers and test environments with masked production data, continuous integration and continuous delivery (CI/CD) pipeline automation, and DevOps automation.

Hyperscalers have improved their partner 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.

From the 51 companies assessed for this study, 17 have qualified for this quadrant, with four being Leaders.

claranet

Claranet maintains its Leader position with comprehensive services and top certifications. It can guide clients in configuring multicloud environments to address data location, security, sovereignty and health regulations.

Devoteam

Devoteam focuses on digital business performance, looking at cloud workloads from the application performance perspective. It operates on the three major clouds with a considerable number of certified practitioners.

orange Business Services

Orange Business offers managed services in all French regions. Its large scale and extensive automation enable a robust cloud platform integrating the top three hyperscalers and three Orange Business enterprise clouds, providing many technology stack options.

ScaleSquad

ScaleSquad is a nimble service provider specializing in the midmarket. It offers custom solutions with client proximity and attention to detail. It partners with the top three hyperscalers and OVHcloud, offering a consistent multicloud portfolio.

Orange Business

Leader

"Orange Business manages multicloud environments from network connectivity to application performance and security, allowing clients to focus on their core business. Clients benefit from cloud efficiency and access to leading AI, IoT, 5G and data analytics."

Pedro L. Bicudo Maschio

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 two million SME clients in Europe 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

One-stop shop: Orange Business' portfolio comprises networking, security, compliance and multicloud operations. Clients can outsource their entire IT operations. The company helps clients decide which infrastructure best fits their needs, including cloud regions in France or other countries, providing easy access to global centers to optimize costs or implement multi-region disaster recovery.

Compliance at all levels: Orange Business offers future-proof solutions with a vast service and technology portfolio, including sovereignty cloud configurations with SecNumCloud, encryption, data location services, and access control combined with cybersecurity tools. It strongly focuses on compliance and the zero carbon goals and invests in people development, providing education and training in France.

Robust automation: Orange Business offers AIOps and FinOps tools to ensure service automation and cost control. AIOps include auto incident classification, assisted remediation, self-service with orchestrated workflows, predictive maintenance and capacity planning, service analytics dashboards and business intelligence reporting.

Caution

Orange Business excels in offering integrated services. Its fabric approach and modular portfolio offer flexible service combinations. However, midmarket clients that do not require multicloud with full-scope services might find the company's offering complex.

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

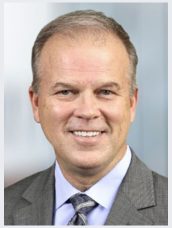
Manoj M

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.

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

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