

Orange OpenTech 2025: Orange Highlights Focus on Delivering Value to Customers as It Leverages Continued Innovation in NaaS and AI



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REPORT SUMMARY:

Orange's focus on delivering value to customers has been made possible after its enduring investment in its flagship Evolution Platform and Live Intelligence services. Tech innovation and customer lifecycle management now in lockstep for Orange.

Summary

Issue

OpenTech 2025 highlighted Orange's focus on turning its innovative platforms and solutions into delivering meaningful outcomes and tangible business value for customers. The floor was particularly busy and teeming with potential customers from France and beyond, perhaps more this year than in either of its two previous iterations, as the company showcased numerous solutions across connectivity, quantum, digital twins, and industrial workplace safety.

Key Takeaways

- Empowering Business" was one of the themes at OpenTech 2025, designed to deliver tangible business revenue, employee satisfaction, and cost benefits to Orange's customers.
- Key areas of innovation included Orange Live Intelligence, satellite connectivity, quantum, digital twins and industrial workplace safety, network APIs, and innovation on the NaaS Orange Evolution Platform.
- Orange's is looking to expand in a number of key areas, including greater geographical availability of Orange Live Intelligence and boosting number of partners on Orange Evolution Platform.

Perspective

Current Perspective

Evolution Platform

Orange announced it is 'evolving' its network-as-a-service (NaaS) Orange Evolution Platform, which was launched to all businesses earlier in 2025, preceded by steady testing and limited rollouts in the two years prior to that. Orange Evolution Platform relies on Orange's global points of presence infrastructure, with super PoPs capable of hosting different network functionalities. The platform has 57 live super PoPs (on top of regular 180+ PoPs internationally and 550+ Pops in France), up from 47 super PoPs; additional super PoPs are scheduled for 2026. There has also been growth in the number of customers now on Orange Evolution Platform, up by over 100 since the summer and now standing at over 300 customers. The expectation that many more businesses will join Orange Evolution Platform and will benefit from Orange Evolution Platform's standardized components and growing ecosystem of partners and collaborators. Orange Evolution Platform can interact with customers on Amazon Web Services (AWS) and Microsoft Azure on unified communications, networking, edge, security, cloud, and observability. Orange stated it has a roadmap to add additional public clouds like Google Cloud Platform (GCP) and Equinix, as well as sovereign French clouds like Bleu and S3NS.

As Orange is one of the very few in this area, it is doing everything to consolidate its NaaS leadership by making it extremely attractive to large enterprises. To this end, Orange announced it intends to roll out significant updates. With standardized components and a growing ecosystem of partners and collaborators, Orange Business demoed its upcoming VPN-as-a-service solution, which is expected to go live this week with a full commercial availability scheduled in Q1 2026. VPNaaS can connect SD-WAN gateways provisioned by third-party operators (like Palo Alto Networks) to Orange's on-demand Cloud Connect service – sourced from different points of presence (like the Paris, France PoP for Palo Alto Networks and Orange Cloud Connect's Frankfurt, Germany PoP) – via a virtual private network, all at the touch of a button, stitching various services together provisioned by the VPN to create a seamless and integrated service in a matter of a few seconds. This is all offered with full observability for customers on pricing. Orange Evolution Platform can now manage bandwidth by customers and can change by the hour based on demand. The bandwidth can dynamically adjust based on demand, and after going through a learning phase and configuration, AI can be deployed for dynamic bandwidth provisioning for future usage.

Orange Live Intelligence

Additionally, Orange showcased updates to the Orange Live Intelligence platform. Orange Live Intelligence originated from Orange's internal AI platform (internally dubbed Dinootoo Chat). It offers multi-LLM support and managed generative AI (GenAI) adoption for employees. The service has attracted eyeballs and, as of October 2025, Orange Live Intelligence has been made available to governments and business organizations of all sizes in the Gulf Cooperation Council region. Orange Live Intelligence is adding a slew of agentic AI features onto the service. In 2026, a new dashboard for Orange Live Intelligence will be rolled out to Orange employees, further improving the GenAI and agentic AI experience. With the company's obligation to be carbon neutral by 2040, Orange Live Intelligence also offers full observability on the carbon impact expected from all AI searches. To this end, Orange Live Intelligence offers a variety of AI tools and versions by OpenAI, Anthropic, and Google Gemini, defaulting to low-impact versions, which can be changed to more recent versions of these tools for more intensive and deeper AI queries.

Alternative WAN

Alternative WAN (dubbed X-WAN at the demo) is a potential product area being researched by the Orange Business R&D department as the next evolutionary step in SD-WAN. The main benefit that the proposed X-WAN targets is a drastic simplification at the customer edge and the offering of open platform standards – Orange with working with open platform provider “prpl” in this regard. The potential service offers AI traffic steering and a multi-site, multi-cloud service with Orange Evolution Platform as the hub, with offloading capabilities at the network edge. This is coupled with a new hardware customer premises equipment (CPE) device that is no larger than a home WiFi router, embedded with a GPU chip. The CPE was showcased on the demo floor. The expectation is that this will enable businesses of all sizes to deploy X-WAN services, especially where physical space on-premises can be an issue. Future features under consideration into the X-WAN service include security, IoT, AI small language models (SLMs), and post-quantum safety, which will all be operable from the CPE.

Satellite

On satellite, Orange announced it is partnering with geostationary orbiting (GEO) satellite vendor Skylo, based in the US, to roll out direct-to-device services in France before end-2025 to Google Pixel 9 and Google Pixel 10 handsets. Although this covers a limited number of devices, and although GEO may pose latency issues (compared to LEO satellites), this does signal a breakthrough in terrestrial-satellite operations. The expectation is that the number of devices, geographies, and business applications will grow. Deutsche Telekom had also announced a deal with Skylo for deployment before end-2025, suggesting activity in this space is about to pick up as we head into 2026.

Recommended Actions

Vendor Actions

- Robust testing of new innovation and solutions are necessary to main reputation, which Orange has successfully accrued over 2025.
- Highlight Orange Evolution Platform is one of the very few telco NaaS platforms that has a tangible existence, and that Orange can point to Orange Evolution Platform as a base for it to be a genuine partner to customers that need that bedrock of stability and innovation.
- Monitor purchases of Orange Live Intelligence in the Gulf Region and assess the level of their success. Highlight successful agentic elements that are implemented in France or other units (like Morocco).
- A miniaturized GPU-carrying CPE, which Orange touted, can be a game changer for many medium businesses that have thus far been excluded by the training and modeling of SLMs. Orange should test this solution extensively and robustly to ensure it deliver the business outcomes it promises to achieve.

User Actions

- It is not just French organizations that are benefiting from Orange innovation on the network and in AI. Orange has indicated it is keen to roll out internationally and will leverage its global PoPs to cast the widest net possible to attract customers to try out Orange Evolution Platform and Orange Live Intelligence. Orange is worth considering when thinking to deploy cost-saving efficient solutions internally.