

Orange Business Services - Collaboration and Communications Services (Global)

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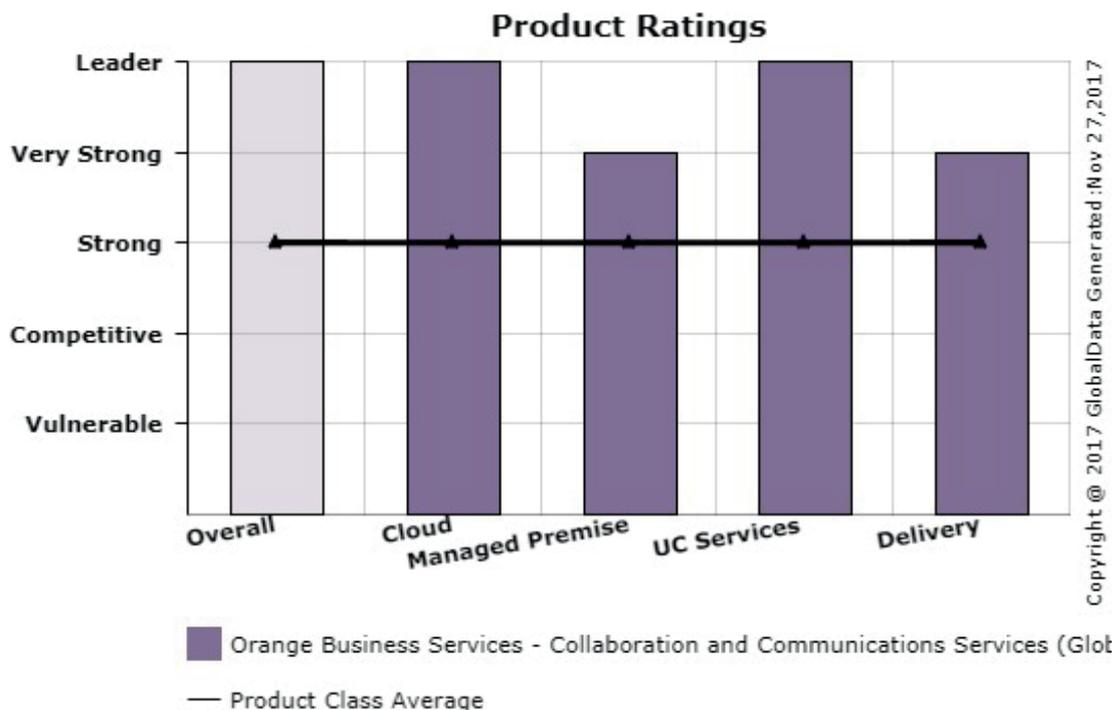
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PRODUCT ASSESSMENT REPORT - COLLABORATION AND COMMUNICATIONS (GLOBAL)

REPORT SUMMARY

OBS's UC portfolio combines hosted Microsoft and Cisco platforms with a compelling sales and marketing strategy backed by a growing range of analytics. OBS has also reported strong sales growth for UC despite strong competition.

SUMMARY



WHAT'S NEW

- **July 2017** - OBS announced the acquisition of Business & Decision, which will give it new analytics capabilities.

PRODUCT OVERVIEW

Product Name	Business Together as a Service	
Description	A suite of hosted and on-premises voice, unified communications, collaboration and contact centre solutions primarily based on Microsoft and Cisco.	
Components	<ul style="list-style-type: none"> • Business Together as a Service • Business Talk • Business VPN Galerie 	
Key Customers	<ul style="list-style-type: none"> • Amcor 	
Key Rivals	<ul style="list-style-type: none"> • Accenture • AT&T • BT • DXC Technology • IBM Global Services 	<ul style="list-style-type: none"> • T-Systems • Tata Communications • Telefonica Business Solutions • Verizon Enterprise Solutions • Vodafone Global Enterprise

ESSENTIAL ANALYSIS

Strengths	<ul style="list-style-type: none"> • Global Presence: OBS offers hosted Business Together based on Microsoft Skype for Business (80+ countries) and/or Cisco HCS (82 countries). Business Talk SIP trunking reaches 154 countries supported by seven SIP data centres worldwide. • Customer Experience: OBS' already first-class customer support, delivered by some 20,000 staff in 166 countries, is improving as it seeks to revitalize customer relations through an intense focus on service simplification and the use of digital technologies to improve end-user experiences. • Self-Service: OBS has created a single portal for B2GaaS customers, regardless of the underlying platform, and made that portal available in 32 languages. • UC Growth: The provider's UC sales growth is ahead of most of its major rivals and it recorded 'record order intake' during December 2016.
Limitations	<ul style="list-style-type: none"> • OTT Erosion: OBS has acknowledged that OTTs represent a particular threat to its UC revenues; this means that overall voice and UC revenues are under pressure despite strong growth in hosted UC sales. • Africa and the Middle East: Orange's Africa-Middle East division has more than 110 million mobile subscribers (out of a group total of approximately 201.7 million), and it offers 4G in ten countries in the region. Although OBS has signed Business Together customers in Africa, growth remains limited versus the potential opportunity.

CURRENT PERSPECTIVE

LEADER

Orange Business Services (OBS) is a market leader in the global UCC market for MNCs, because the provider combines a compelling range of services and vendor platforms with a compelling and nuanced approach to selling collaboration services. OBS also provides differentiation via faster capability turn-ups (it can switch on a country in two to five weeks), enhanced analytics capabilities (further bolstered by the acquisition of Business & Decision), and leveraging improved internal network monitoring and application management tools to create better user experiences.

The company's go-to-market approach is to provide comprehensive consulting on customers' digital transformation strategy, backing this with an offer to take over their legacy systems and applications and shepherd the firm through the transition to a simplified global ICT infrastructure. Orange offers customers a choice of market-leading and innovative suppliers wrapped in an appropriate delivery model. In practice, this means its Business Together as a Service (B2GaaS) is based on both Cisco HCS/Spark and Microsoft Skype for Business platforms in cloud, hybrid and on-premises managed formats, tied together by its Business Talk voice services and Business VPN Galerie service, with connectivity to key application suites such as Microsoft Office 365 and smartphone access provided via 3G, 4G, public WiFi and dial-up using a mobility package called Business Everywhere Smart. OBS's Microsoft offering provides a hybrid solution combining Skype for Business and Office 365 (Skype for Business Online). Customer can use Orange's full Skype for Business platform for large sites whilst Office 365 can be deployed at smaller sites, increasing flexibility and reducing deployment times for new/temporary sites.

Orange Business is responding to customers' demand to integrate their UCC systems with Google's office products using middleware such as Esna. Orange's 'Digital Inside' practice also allows UC platforms to be integrated with enterprise social collaboration platforms such as Jive and persistent chat applications like Cisco Spark and Microsoft Teams. The provider is also using WebRTC for UC use cases. Other supported systems include X Medius, Mind CTI, Sonus, Landis, AudioCodes, Peters Connect and Avaya for UC; Cisco WebEx and CMR, PGI GlobalMeet and Cisco CCA for conferencing; Jive and SharePoint for sharing; and Cisco, Polycom and Smart for video.

COMPETITIVE RECOMMENDATIONS

Provider

- **Social Media:** OBS should underline how it is integrating social media platforms such as Facebook and technologies such as WebRTC into its solutions.
- **Internal Programmes:** OBS has the opportunity of the work it has done internally to engender more collaborative working practices - and can use the work its own HR team is doing as a case study.
- **APIs:** OBS should underline the work it has done and its future roadmap regarding APIs, enabling it to enhance its customer portal and self-management options and strengthening its integration capabilities.

Competitors

- **Selling Collaboration:** OBS competitors should look at OBS as a strong example of how UC services should be sold as a business solution rather than a technology.
- **Vendor Platforms:** Global competitors which can offer hosted solutions from vendors such as BroadSoft, Unify and Mitel may be able to achieve differentiation versus OBS.
- **OTTs:** The opportunity is there for providers to engage more with disruptors such as Facebook,

Google and AWS as they look to move into the collaboration market. Such vendors offer potential differentiation against today's market leaders.

Buyers

- **Global Presence:** MNC providers with diverse global need should look to OBS because of its compelling on-net UC delivery footprint and global support capabilities.
- **Culture Change:** Customers looking to change the way they work internally should be aware that OBS offers consultancy services to non-existing customers.
- **Other Vendors:** UC buyers should look at solutions from vendors other than Microsoft and Cisco, which may mean looking elsewhere than OBS.

Metrics

CLOUD/HOSTED SOLUTIONS

Rating	Leader
Service(s) Name	Business Together as a Service (B2GaaS), Business Together Cisco, Business Together Microsoft UC, Business Talk
Geographic Reach	Business Together as a Service: 80 (Microsoft; new countries are Chile, Peru, El Salvador), 82 (Cisco) countries served by data centres in Washington, Atlanta, London, Paris, Frankfurt, Singapore Sydney. Four acquisitions (Liberia, Sierra Leone, Burkina Faso and DRC) give Orange the biggest footprint in the fastest-growing mobile market, but Orange Business cannot afford to ignore North America, the world's richest UCC market.
Platform	Business Together and B2GaaS: Cisco HCS and Microsoft Skype For Business; A highly pre-configured hosted version of Skype for Business for SMEs is available.
Service Delivery Model	Business Together Microsoft: Shared infrastructure, dedicated software instance hosted in Orange Business data centres, full customisation, end-to-end SLA, pay per user. Business Together as a Service Cisco: Shared infrastructure, dedicated software instance hosted in Orange data centres, some customisation, end-to-end SLA, third-party network integration, pay per user.
Access Options	SIP trunking; Ethernet, xDSL, mobile access; support for third-party IP VPN networks. IP VPN access, Internet - VPN: Business Galerie allows enterprises to access cloud services (e.g., Orange Business, Microsoft Office 365, Google Apps for Work) via the enterprise's private network. Orange Business has 54 voice PoPs in 38 countries, with more than 65 interconnected partners. Number allocations with geographic/non-geographic numbers, and number portability for most countries. Redundancy: Dual router, dual access, dual PoP.
NRC	One-time service and site activation fee. Business Together as a Service Cisco includes licenses; Business Together Microsoft does not.

MRC	MRC per user, per profile, per month based on the profile selected per user. Seven user profiles available for Business Together as a Service Cisco and Business Together Microsoft.
Handsets Included	Phones sold directly to customer, leased or can be included in an OpEx model.
Contract Length	Three to five years
Service Availability SLA	Platform service availability - 99.95%, with option of 99.99%
Voice Quality SLA	Voice Network Availability: 99.99% MOS: 4.1 Call Completion Ratio (CCR) = 99.8% Post Dial Delay (PDD) = 4 sec
Underlying Transport SLA	Packet delivery: ranges from 0.1% to 0.4% Jitter: 40 ms or less Latency: less than 100 ms worldwide
Other SLA	Available on supporting premises-based infrastructure such as voice gateways

MANAGED PREMISES-BASED SOLUTIONS

Rating	Very Strong
Service(s) Name	Business Together supported by Business Talk (SIP trunking), PBX Management
Geographic Reach	<p>Business Talk: 154 countries. Full PSTN replacement: Australia, Austria, Belgium, Denmark, Finland, France, Germany, Italy, Ireland, Italy, Luxembourg, Netherlands, Norway, Portugal, Russia, Spain, Sweden, Switzerland, UK; French international divisions: French Guyana, Guadeloupe, Martinique, Mayotte, Reunion Islands. New Zealand planned for summer 2015 and USA planned for spring 2016. Canada, Eastern Europe, Hong Kong, Singapore, under consideration for future deployment.</p> <p>Business Talk local voice (DID only): Bahrain, Brazil, Bulgaria, Canada, Chile, Croatia, Czech Republic, Estonia, Georgia, Greece, Hungary, Japan, Latvia, Lithuania, Malaysia, Malta, New Zealand, Poland, Puerto Rico, Romania, Singapore, Slovakia, Slovenia, S. Africa, S. Korea, Taiwan, Turkey, USA.</p> <p>Managed PBX in 213 countries.</p>

Voice & UC Vendors Supported	Aastra, Alcatel-Lucent OmniPCX Enterprise, Avaya Communications Manager & Aura Session Manager, Cisco Unified Communications Manager & Unified Communications Manager Express, Microsoft Lync Server 2010 & Lync Server 2013, Skype for Business Server 2015 and new vendors integrated into certification programme, Unify OpenScape Voice (formerly Siemens) and Mitel Managed Premises-based Solutions.
Access Options	<p>SIP trunking: Access via MPLS, customers can also use symmetric DSL, and Orange Business will support access delivered via a third party.</p> <p>TDM: Switched and dedicated access; SIP trunking intra-company calling on-net 154 countries; international calling off-net 88 countries; domestic calling off-net 78 countries; local calling DID, dial tone 24 countries, 50 DID porting (only); Orange Business supports geographic redundancy options.</p>
NRC	<p>With break/fix & remote assistance operational services.</p> <p>Orange Managed: End-to-end service with equipment provisioning.</p> <p>Rental Model: End-to-end service including IPT core equipment (excludes IP phones).</p> <p>Resale Model: Customer owns equipment ordered directly or through a lease.</p> <p>Also assess, design, deployment, management.</p>
MRC	Per user, per month based on number of active users; also MRC per gateway.
Buying/Leasing Options for CPE	Rental, resale and leasing options available.
Handsets Included	Phones sold directly to customer, leased or can be included in an OpEx model.
Per Seat Pricing Availability	Price per user profile available.
Contract Length	Three to five years
Service Availability SLA	Application Server Availability: 99.95% (on customer premises)
Voice Quality SLA	<p>Voice Network Availability: 99.99%</p> <p>MOS: 4.1</p> <p>Call Completion Ratio (CCR) = 99.8%</p> <p>Post Dial Delay (PDD) = 4 sec; Business Talk offers high availability with enhanced voice QoS monitoring in place 24/7 and centralized voice reporting.</p>
Underlying Transport SLA	<p>Packet delivery: ranges from 0.1% to 0.4%</p> <p>Jitter: 40 ms or less</p> <p>Latency: less than 100 ms worldwide</p>

Other SLAs Available	Not available
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UC SERVICES

Rating	Leader
Audio Conferencing	Orange Audio Conferencing, on-net UC Services, Cisco Cloud Connected Audio
Web Conferencing	Cisco WebEx, Cisco Spark, Microsoft Skype for Business, Adobe Acrobat Connect
Video Conferencing	<p>Open Videopresence cloud-based on-net video in 106 countries, Open Videopresence Flexible Express for all types of video equipment, and Flexible Premium for immersive telepresence systems.</p> <p>Orange Business Services is a Cisco Collaboration Meeting Room partner. CMR Cloud is hosted by WebEx; CMR Hybrid supports on-premises telepresence plus WebEx; CMR Premise supports full telepresence infrastructure.</p> <p>Platform support: Cisco CTX, Polycom.</p>
Geographic Regions of Bridging Exchanges	Open Videopresence has three exchanges located in France and the US.
Video Software Clients Supported	Cisco and Polycom immersive/non-immersive video options; also supports Huawei and a range of other platforms including LifeSize (Avaya), Sony and Aethra Telecommunications. Orange Business offers its own branded iOS and Android mobile video clients and supports third-party standard mobile device clients.
Managed Telepresence	Includes Avaya (formerly Radvision), Cisco Telepresence, and Polycom, as well as support for additional bridging platforms. Telepresence exchange includes CTMS and MSE.
Geographic Regions of Bridging Exchanges	Telepresence service has two exchanges (France and the US).
IM, E-mail and Desktop Integration	Cisco Jabber, Cisco Spark, Skype For Business, Microsoft Exchange & SharePoint, Office 365, IBM Sametime and Lotus Notes (on request); Microsoft is integrated with leading telephony vendors, along with leveraging Microsoft Enterprise Voice; Cisco UC integrated with Skype for Business and Gmail on request; and SIP trunking. Federation available for IM and presence on request.
Softphone Support	All major vendor softphones are supported including Avaya one-X, Cisco Jabber, Cisco Spark, and Microsoft Skype For Business.

IP Contact Center Services based on Avaya, Cisco and Genesys.

Contact Center Access: Call collection solution that supports real-time routing management. Available in 120+ countries, can provide local numbers in Africa, India and Turkey.

Network-IVR: Interactive Voice Response.

Flexible Contact Center: Hosted contact centre solution based on CosmoCom; recently added features include database access, voice recognition, mail and chat.

Managed Contact Center: Managed premises-based solution. Orange Business also supports contact centre features from the Business Together as a Service Cisco HCS platform.

Mobile Capabilities Alcatel-Lucent Cellular Extension; Avaya Extension to Cellular; Cisco Unified Mobility; and Microsoft Mobility, supported for single number reach, simultaneous ringing of desk phone and mobile, calling from mobile through IP PBX, and UC client on mobile phone for presence and IM.

IPT AND UC SALES AND SERVICE DELIVERY

Rating Very Strong

Sales Strategy A focus on transformation: lower voice and telephony costs today through PBX management and VoIP, while supporting a client's UC roadmap; fully support best-in-class approach with a flexible service model based on operational best practice; ITIL, ISO certified, Skype Operations Framework (SOF).

UC Professional Services 50 presales solution specialists and architects and 100 billable consultants in every major country provide consulting, assessment, design, project management, field engineering for deployment and break/fix in 166 countries.

Type of Partner Status Achieved

Avaya: Global Gold partner and Platinum partner in Europe

Cisco: Global Gold partner; Global Resale Certified Partner, Global ATP Cisco Telepresence Video Master, Managed Services Master Certification worldwide; Global Cloud Provider; UC Master Certification in the US and France

Microsoft: Global Partner, Microsoft High Touch and Skype Operations Framework partner, Premier Support for Skype for Business global partner. Orange Business holds Gold competency for Communications, Collaboration & Content, and Cloud Productivity; and Silver for Application Development.

Polycom: Global Strategic Partner, Platinum Partner in France

UC Delivery Capabilities

Design: 100+ experts provide presales consulting and complex solution design.

Implementation: 250+ trained and certified project managers and 1,500 field engineers.

Maintenance and management: 350 local specialists worldwide for ongoing support and management.

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