



Ian Grant  
Senior Analyst

# Orange Mobile Enterprise

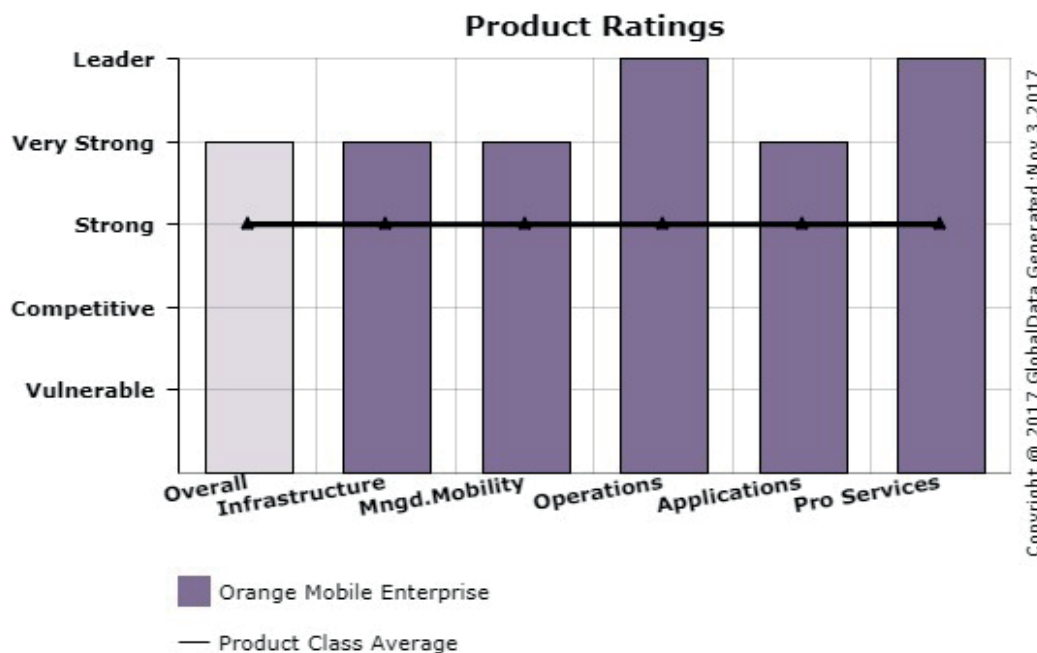
October 09, 2017

## PRODUCT ASSESSMENT REPORT - GLOBAL ENTERPRISE MOBILITY SERVICES

### REPORT SUMMARY:

OBS's dedication to integration and customization of industry standard products to meet MNCs' specific needs continues to retain clients, attract new ones, differentiate the vendor and grow its revenues from value added services.

### SUMMARY



### WHAT'S NEW

- July 2017 - Revealed increased integration and cooperation with Bridge Alliance via Freemove, adding mobile roaming in APAC for OBS clients, and a CSP-agnostic capability to add non-alliance members to EMS solutions.
- September 2017 - Revealed work to offer a fully outsourced EMS capability to customers alongside real-time Malware and Threat Protection

- September 2017 - Revealed it is exploring adding MobileIron Access for secure mobile access to private and public clouds in response to customer demand. Product Overview

## PRODUCT OVERVIEW

<b>Product Name</b>	Orange Mobile Enterprise	
<b>Description</b>	<p>Orange has strong experience in managing complex multinational customers and offers tailored and comprehensive managed mobility services with optimized connectivity, value-added services for security, cost and process management, and industrialized service management. Orange Mobile Enterprise offers a set of products and services that span customer relationship management, identity and data protection, mobility and workspace management, mobility solutions and smart machines and objects. More than most, OBS has specialized in creating highly tailored mobility, fixed, mobile and virtual connectivity and workspace solutions to its MNC client base.</p>	
<b>Components</b>	<ul style="list-style-type: none"> <li>• Connectivity - LTE access to 30 European countries and cellular access to 25 countries in MEA, 35 in APAC, and more than 60 million Wi-Fi hotspots and inflight services.</li> <li>• Process and cost management - works with Datanet, Samsung and Tangoe on highly automated processes for service management, optimization and cost control.</li> <li>• Mobile device, app and content security - provides managed solutions via cloud, and secure mobile gateways on premises and in cloud, with corporate app stores to deliver mobile threat detection, secure cloud access, UEM and consulting.</li> </ul>	
<b>Key Customers</b>	<ul style="list-style-type: none"> <li>• Belgian Federal Public Service of Foreign Affairs</li> <li>• Broadcom</li> <li>• Dacom</li> </ul>	<ul style="list-style-type: none"> <li>• Groupe Union-Matériaux</li> <li>• JTI</li> <li>• Solvay</li> </ul>
<b>Key Rivals</b>	<ul style="list-style-type: none"> <li>• Accenture - Global Enterprise</li> <li>• AT&amp;T - Global Enterprise</li> <li>• BT - Global Enterprise</li> <li>• DXC</li> <li>• Google</li> <li>• IBM Global Services - Global Enterprise</li> <li>• Telefónica Business Solutions - Multinational</li> <li>• T-Systems - Global Enterprise</li> <li>• Verizon Enterprise Solutions - Global Enterprise</li> <li>• Vodafone Vodafone Global Enterprise - Global Enterprise</li> </ul>	

## ESSENTIAL ANALYSIS

### Strengths

- Orange has strong experience in managing complex multinational customers and offers tailored and comprehensive managed mobility services with optimized connectivity, value-added services for security, cost and process management, and industrialized service management including implementation and project management as well as IT service integrations.
- Orange offers a personalized tariff for business users, Optimized Mobility Management, with profile-based voice and data bundles for travelers that are always optimized due to continuous consumption analysis.
- Orange offers mobility alongside unified communications/collaboration, IT management, cloud services, and security, which are all elements of its vision of the digital workspace.

### Limitations

- While Orange has a vertical approach in IoT and offers some vertical B2B apps in accounting, audit, commerce, etc., it has not set up a formal vertically oriented organizational structure to provide focus to its mobility offer.
- Vodafone remains a strong competitor, and still gains customers that want widespread mobile connectivity from a single supplier.

## CURRENT PERSPECTIVE

### Very Strong

Orange is very strong in global managed mobility services because it offers a comprehensive engagement, from consulting to secure end-of-life device management, to a clearly targeted market, which allows it to focus on customization to drive success in a competitive but innovation-light market.

Orange Mobile Enterprise (OME), the entity within Orange Business Services that focuses on MNC mobility and IoT, targets 600 global accounts that need central governance, and have significant growth potential. It attracts them with tailored, optimized connectivity, process and cost management, EMM and enhanced security via Orange's Cyberdefense unit, application and content management, staging, and logistics. It has developed a flexible end-to-end service process to manage these activities across more than 100 countries and connectivity partners such as the FreeMove and Bridge alliances. It also has a number of contracts where it provides the management while another CSP provides the connectivity.

Orange offers EMS alongside peer services such as fixed voice, UC, security, and mobile application development, both independently (it responds to "pure" EMS RFPs) and as part of a wider digital masterplan to optimize the customer's use of IT and network resources (including collaboration, IT management, VPNs, and security services).

A complete service integrator/orchestrator, supported by global 24x7 service management, it offers public, hybrid, and private cloud delivery model as well as on-premises EMM platforms. EMM includes MDM, MAM, secure container, and enterprise app store through MobileIron, with Samsung Knox an option for enhanced device encryption. Orange has integrated UC and mobility so that customers can push the UC client onto mobile devices via EMM and access the service with single sign-on. Its Optimized Mobility Management tariff provides customers with customized plans or bundles based on employee profiles that are analyzed and optimized continuously.

Orange specializes in custom application development through the Orange Application for Business (OAB) unit. This unit, with 900 of 2,700 staff dedicated to mobility and IoT, provides system and application

consulting, design, integration, and testing to optimize customer experience. This dedication saw its revenues from mobility-related value added service rise 66% in the past year.

## COMPETITIVE RECOMMENDATIONS

### Provider

- **Steady as She Goes:** Orange should continue to focus on adding value while preserving margins through integration, customization and service delivery as this is the right approach to win business in a largely commoditized market.
- **Stretch the Competition:** Orange needs to speed up its adoption and implementation of emerging technologies such as blockchain, wearables, AI/ML and AR/VR in its customization offer, further differentiating it from competitors.
- **Exploit Flexible Engine:** Orange should use its new Flexible Engine public cloud platform, now covering France, Europe and south-east Asia, with MEA to come in 2018, to launch mobility services, not only to MNCs.

### Competitors

- **Specialize:** Orange has impressive on-net reach, but it's relatively weak in APAC and the Americas, so competitors such as Deutsche Telekom should stress their geographically differentiated offers and also play up their improving SD-WAN capability and internetwork connectivity.
- **Adopt a Position:** Competitors like BT can continue to focus on coverage and product integration to simplify offers and cut costs, leaving grandiose but risky development projects to others.
- **Play the Ecosystem Card:** Competitors can match Orange's in-house application development and integration strengths using an ecosystem of third parties.

### Metrics

## ENTERPRISE MOBILITY SERVICES INFRASTRUCTURE

Rating	Very Strong
<b>Strategic Relationships / Platform Partners</b>	Freemove/Bridge Alliance, MobileIron (MDM, MAM, MCM, Unified End-point Management), Datanet (Telecom Expense Management and central ordering), Tangoe (TEM), Samsung (staging), Apple, Cisco (Spark), Microsoft (Lync UCC)
<b>Network Footprint</b>	Fixed: 118 countries; Mobile: 106 countries (30 with 4G/ LTE access); Wi-Fi: 120 countries with 60 million hot-spots. Satellite: Global VSAT coverage, including oceans.
<b>Global Availability</b>	Has developed a CSP-agnostic service management platform that has expanded Orange's ability to add CSP partners beyond Freemove/Bridge. Is also building its capability to manage a fully-outsourced EMS service for customers.

## MANAGED MOBILITY SERVICES

Rating	Very strong
<b>Mobile Device Management</b>	Managed solution based on MobileIron and hosted on Orange cloud.
<b>Mobile Application Management</b>	MobileIron. Supports iOS and Android devices, and is testing Windows 10.
<b>Security Management</b>	Provides VPNs and security controls as well as managed authentication, encryption and SSL services. Also threat identification and prevention services.
<b>TEMS/Logistics Management</b>	Bases service on Datanet, Tangoe, Samsung.
<b>Other (e.g., device virtualization, performance management)</b>	Connectivity optimization - Value Orange, Cisco Apple (VOCA) provides E2E support for Wi-Fi deployment, Cisco Spark integration and Apple iPad and iPhone configuration and management, with network optimization.Context-aware availability - OBS is researching a “personal bot” that allows users to discriminate between callers and respond appropriately via SMS.when the user is “unavailable”. Customization - increasing request for tailored services have led to investment in pre-sales, consulting and professional services management.

## OPERATIONS

Rating	Leader
<b>Device Lifecycle Management</b>	Provides total lifecycle management for mobile devices, include OS strategy. Mobile fleet management covers e-catalogue, device ordering, tracking & inventory, delivery, testing, DOA management, staging, repacking, tagging, on-site support, and service management. Coming are moves, adds, changes and deletes management, and SLA follow-ups.
<b>Tiered Service Packages</b>	Three (standard, advanced, premium)
<b>Client Care / HelpDesk Services</b>	OME has a dedicated mobility team that provides 24x7 support in French and English. This is in addition to the OBS support team which offers 24x7 service in 30 languages in160 countries. Trained in project management systems e.g. ITIL, SixSigma, PMP, Prince2.

## MOBILE APPLICATIONS

Rating	Very strong
<b>Custom Development Services</b>	Can design, deliver and manage custom-built end-to-end mobile device and expense management, application development and desktop virtualization services.
<b>Mobile Security Apps</b>	Main app is Airwatch, but can provide any the customer wants. Orange is adding realtime Malware and Threat Protection (MTP) to its portfolio, giving it the ability to close down instantly devices detected to be infected or misbehaving. Managed EMM offer supported by 350 security specialists; malware and threat detection, plus support for GDPR.
<b>Top Packaged Applications</b>	UCC
<b>Other (e.g., Workplace as a Service, Mobile Messaging)</b>	Customizable Connection Kit client automatically chooses best available access method , including dial-up, with optional SSL connections.

## PROFESSIONAL SERVICES

Rating	Leader
<b>Business Consulting</b>	OBS has increased its capacity to analyse and address business-related issues, including fixed-mobile convergence, application development and support, E2E device management, process simplification and mobile security. Provides proactive alerts on e.g. GDPR and plans to address it.
<b>Technical Consulting</b>	Experts in cloud, UCC, business applications, integration. Device rationalisation, OS strategy, BYOD.
<b>Systems Integration</b>	OBS acts as supplier and/or integrator, depending on client needs.
<b>Admin/End-User Portals</b>	Provides mobility services management hub. Mobile fleet management covers e-catalogue, device ordering, tracking & inventory, delivery, testing, DOA management, staging, repacking, tagging, on-site support, and service management. Coming are moves, adds, changes and deletes management, and SLA follow-ups.

All materials Copyright 2017 GlobalData. Reproduction prohibited without express written consent. GlobalData logos are trademarks of GlobalData. The information and opinions contained herein have been based on information obtained from sources believed to be reliable, but such accuracy cannot be guaranteed. All views and analysis expressed are the opinions of GlobalData and all opinions expressed are subject to change without notice. GlobalData does not make any financial or legal recommendations associated with any of its services, information, or analysis and reserves the right to change its opinions, analysis, and recommendations at any time based on new information or revised analysis.