



# Orange Business Services - Collaboration and Communications Services (Global)

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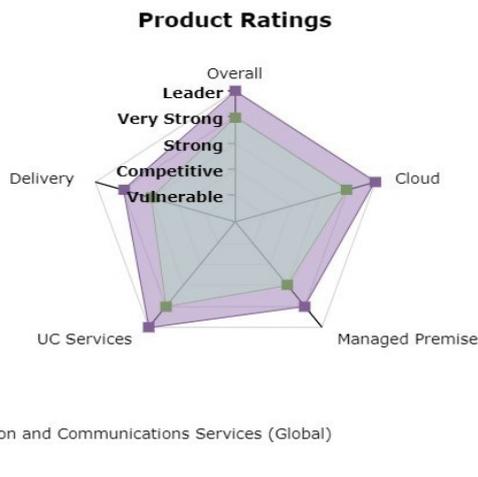
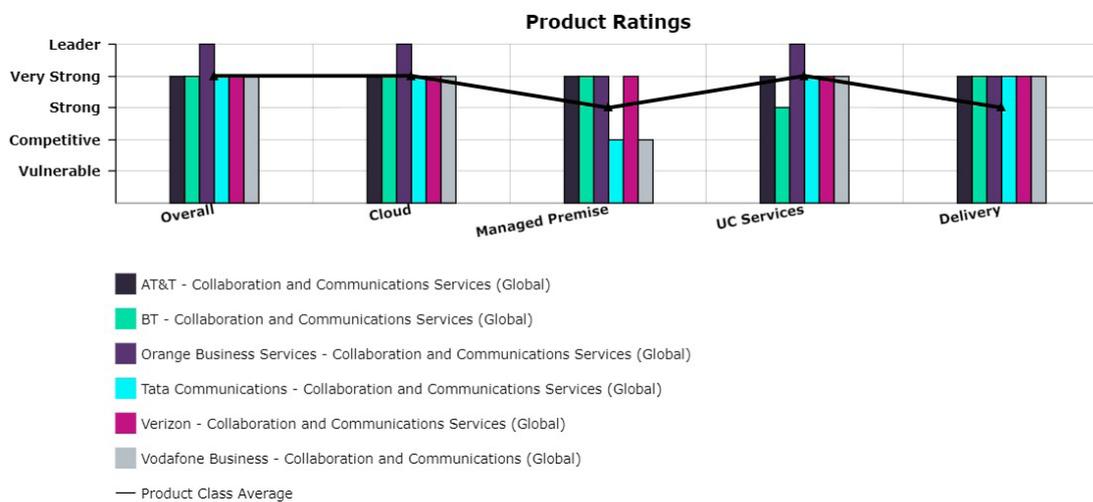
September 25, 2020

## PRODUCT ASSESSMENT REPORT - GLOBAL COLLABORATION AND COMMUNICATIONS

### REPORT SUMMARY

Orange's focus on developing mobile worker and homeworker solutions has left it well placed to respond to support its customers during COVID-19. The company has maintained a leading portfolio with the addition of enhanced integration capabilities.

### SUMMARY



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## WHAT'S NEW

- **July 2020:** Orange Business Services won a contract to deliver collaboration and contact center services for ZIM to improve customer experience in its cargo shipping business.
- **March 2020:** Orange Business Services announced that it has increased the capacity of its networks and service platforms to provide remote working solutions such as Open Videopresence, Audio and Web Conferencing, etc.
- **February 2020:** Orange Business Services collaborated with Microsoft to connect Business Talk SIP Trunks to Microsoft Teams Direct Routing, aiming to provide the simplicity of a single voice provider, cost optimization, and the ability to meet regulatory requirements.
- **January 2020:** Orange Business Services introduced new technology with Cisco Webex Contact Center, a native cloud contact center solution based on the latest Cisco software, which leverages the innovation, flexibility, and agility of cloud with security and global scalability.

## MARKET OVERVIEW

Product Name	Business Together
<b>Description</b>	A suite of hosted and on-premises voice, unified communications, collaboration, and contact center solutions primarily based on Microsoft and Cisco with an accompanying network of ecosystem partners.
<b>Components</b>	<ul style="list-style-type: none"> <li>• Business Talk</li> <li>• Business Together Microsoft including Direct Routing</li> <li>• Business Together Cisco</li> <li>• Cisco Webex Calling and Cisco Webex Contact Center delivered by Orange</li> <li>• Open Videopresence</li> <li>• Audio and Web Conferencing</li> <li>• Business Together as a Service</li> <li>• Business VPN Galerie</li> </ul>
<b>Key Customers</b>	<ul style="list-style-type: none"> <li>• Amcor, Japan Tobacco International</li> </ul>
<b>Key Rivals</b>	<ul style="list-style-type: none"> <li>• Accenture</li> <li>• AT&amp;T</li> <li>• BT</li> <li>• DXC Technology</li> <li>• IBM Global Services</li> <li>• T-Systems</li> <li>• Tata Communications</li> <li>• Telefonica Business Solutions</li> <li>• Verizon Enterprise Solutions</li> <li>• Vodafone Global Enterprise</li> </ul>

## ESSENTIAL ANALYSIS

### Strengths

- **Global Presence:** Orange offers hosted Business Together based on Microsoft Skype for Business and Teams Direct Routing (80+ countries) and/or Cisco HCS (93 countries). Business Talk SIP trunking reaches 142 countries and territories for on-network calling, as well as 80 off-net, and provides local voice service with DID assignment in 50 countries and territories.
- **Customer Experience:** Orange's first-class customer support is delivered by 21,316 staff in 166 countries (including 7,700 in customer services and operations, with 3,400 experts offering 24x7 support across five global customer service centers). Orange also offers compelling pre-sales consultative support.
- **CPaaS:** Orange is establishing itself as a provider of CPaaS solutions. Using its Orange Labs R&D capabilities and an ecosystem of partners, Orange has worked to create bespoke communications platforms for customers including mass communication solutions and chatbots, and it has invested in APIs and the ability to embed communications within apps. Orange can also integrate features such as voice, SMS, and OTT services such as WhatsApp.
- **UC Growth:** Orange reported overall growth of 8% for 2019, with 15.1% growth for its Business Together-as-a-Service solution, driven by 45.4% growth in the Cisco-based version of the product while Contact Center grew by 38.1%.

### Limitations

- **OTT Erosion:** Orange has acknowledged that OTTs represent a particular threat to its UC revenues. However, Orange is seeking to counter the threat by adding WhatsApp to its proposition through its CPaaS capabilities.

## CURRENT PERSPECTIVE

### LEADER

Orange Business Services (Orange) 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. Orange provides differentiation via enhanced analytics capabilities (further bolstered by the acquisition of Business & Decision) and the leveraging of improved internal network monitoring and application management tools (e.g., Visibility-as-a-Service) to create better user experiences. The company has also expanded its CPaaS capabilities, using its Orange Labs R&D capabilities to help customers embed UC into applications.

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 UCaaS offer is based on both Cisco HCS/Webex (Business Together as a Service) and Business Together Microsoft Skype for Business/Teams platforms in the cloud providing hybrid and on-premises managed formats where applicable. These are complemented 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, 5G, and public WiFi. Orange has also collaborated with Microsoft to connect Business Talk SIP Trunks to Microsoft Teams Direct Routing- a product that has provided a source of growth, with Orange already into double figures in terms of live customers- and it reports a strong pipeline with multiple potential new logo wins. Orange reports that growth has been particularly strong for its Microsoft variant of its Business Together-as-a-Service collaboration proposition. It has also now added G Suite and Zoom Meeting into Business Together, with Zoom Phone to be added during H2 2020.

Orange's focus has inevitably shifted more towards supporting homeworkers in light of COVID-19. The provider already had a strong remote worker proposition combining its Microsoft Teams and Cisco Teams platforms with a managed mobility offering as well as a long-available virtual desktop infrastructure (VDI) provided on- or off-premises or as a desktop-as-a-service (DaaS) offering. As well as supporting homeworkers, Orange is seeking to work with its enterprise customers to use collaboration platforms to deliver a consistent and enriched customer experience.

Contact center is also a key part of Orange's 'omnichannel' collaboration and customer experience strategy. Orange states that 80% of its customers believe that the combination of UC and CC services will improve the customer experience. The provider believes its CPaaS platforms and API and application integration capabilities will allow it to differentiate itself in the space.

## COMPETITIVE RECOMMENDATIONS

### Provider

- **Social Media:** Orange should underline how it is integrating social media platforms such as Facebook and technologies such as WebRTC into its solutions.
- **Analytics:** Business & Decision gives Orange compelling access to analytics capabilities. Orange is already using these for pre-sales, but should consider how analytics can be used to improve UC adoption and to prove RoI on UC deployments.
- **APIs:** Orange 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:** Competitors should look at Orange 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 Unify and Mitel may be able to achieve differentiation versus Orange.
- **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 and complex global needs should look to Orange 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 Orange offers consultancy services to non-network customers.
- **Other Vendors:** UC buyers should look at solutions from vendors other than Microsoft and Cisco, which may mean looking elsewhere than Orange.

## METRICS

### Cloud/Hosted Solutions

<b>Rating:</b>	Leader
<b>Service(s) Name:</b>	<ul style="list-style-type: none"> <li>• Business Together as a Service (B2GaaS), Business Together Cisco, Business Together Microsoft</li> </ul>
<b>Geographic Reach:</b>	<ul style="list-style-type: none"> <li>• Business Together as a Service: 93, (Cisco) countries served by data centers in Washington, Atlanta, London, Paris, Frankfurt, Singapore, Sydney, and customer-specific data centers like China. 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. Business Together Microsoft available in 82 countries.</li> </ul>
<b>Platform:</b>	<ul style="list-style-type: none"> <li>• Business Together Microsoft and Business Together as a Service: Cisco HCS and Microsoft Skype for Business/Teams</li> </ul>
<b>Service Delivery Model:</b>	<ul style="list-style-type: none"> <li>• Business Together Microsoft: Shared infrastructure, dedicated software instance hosted in Orange Business data centres, full customisation, end-to-end SLA, pay per user.</li> <li>• 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.</li> </ul>
<b>Access Options:</b>	<ul style="list-style-type: none"> <li>• Ethernet, xDSL, mobile access; SD-WAN, 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.</li> </ul>
<b>NRC:</b>	<ul style="list-style-type: none"> <li>• One-time service and site activation fee. Business Together as a Service Cisco includes licenses; Business Together Microsoft does not and relies on Microsoft Enterprise Agreement or Office 365 plans.</li> </ul>
<b>MRC:</b>	<ul style="list-style-type: none"> <li>• MRC per user, per profile, per month based on the profile selected per user. Ten user profiles available for Business Together as a Service Cisco and seven for Business Together Microsoft. Minimum commitment of 500 Basic Profiles per region.</li> </ul>

<b>Handsets Included:</b>	<ul style="list-style-type: none"> <li>Endpoints sold directly to customer, leased, or can be included in an OpEx model.</li> </ul>
<b>Contract Length:</b>	<ul style="list-style-type: none"> <li>Three to ten years</li> </ul>
<b>Service Availability SLA:</b>	<ul style="list-style-type: none"> <li>Platform service availability- 99.95%, with option of 99.99%</li> </ul>
<b>Voice Quality SLA:</b>	<ul style="list-style-type: none"> <li>Voice Network Availability: 99.99%</li> <li>MOS: 4.1</li> <li>Call Completion Ratio (CCR) = 99.8%</li> <li>Post Dial Delay (PDD) = 4 sec</li> </ul>
<b>Underlying Transport SLA:</b>	<ul style="list-style-type: none"> <li>Packet delivery: ranges from 0.1% to 0.4%</li> <li>Jitter: 40 ms or less</li> <li>Latency: less than 100 ms worldwide</li> </ul>
<b>Other SLA:</b>	<ul style="list-style-type: none"> <li>Available on supporting premises-based infrastructure such as voice gateways. Three levels of service objectives are available.</li> </ul>

## MANAGED PREMISES-BASED SOLUTIONS

<b>Rating:</b>	<ul style="list-style-type: none"> <li>Very Strong</li> </ul>
<b>Service(s) Name:</b>	<ul style="list-style-type: none"> <li>Business Together Cisco and Business Together Microsoft supported by Business Talk (SIP trunking), PBX Management</li> </ul>
<b>Geographic Reach:</b>	<ul style="list-style-type: none"> <li>Business Together Cisco Available globally in 155 countries supporting 1.75 million end users, Business Together Microsoft available in 82 countries, complemented by Business Talk: on-net in 142 countries. Business Talk local voice: Full PSTN replacement including access to emergency services in 29 countries and territories (Australia, Austria, Belgium, Denmark, Finland, France, Germany, Hong Kong, Italy, Ireland, Italy, Luxembourg, Netherlands, New Zealand, Norway, Poland, Portugal, Russia, Spain, Sweden, Switzerland, UK, U.S., Norway, and French international territories: Svalbard and Jan Mayen, French Guyana, Guadeloupe, Martinique, Mayotte, Reunion Islands). Canada, Czech Republic, Malaysia, Singapore, under consideration for future deployment. Business Talk local voice: partial PSTN replacement (numbers assignment but no service access to short-codes numbers and other features) in 21 countries (Bahrain, Bulgaria, Canada, Chile, Croatia, Czech Republic, Estonia, , Greece, Hungary, Japan, Latvia, Lithuania, Malaysia, Malta, Puerto Rico, Romania, Singapore, Slovakia, Slovenia, South Africa, Taiwan).</li> <li>Managed third-party PBX in 165 countries.</li> </ul>

**Voice & UC Vendors Supported:**

- Business Talk is certified to inter-operate with Aastra, Alcatel-Lucent OmniPCX Enterprise, Avaya Communications Manager & Aura Session Manager, Cisco Unified Communications Manager & Unified Communications Manager Express, Unified Contact Center Express, Microsoft Skype for Business Server 2015 and 2019 and new vendors integrated into the certification program, such as Unify and Mitel.

**Access Options:**

- Business Talk SIP trunking supported over various access methods: Ethernet, SDSL, SD-WAN, Internet (TLS1.2 standard, IP Sec on a case by case basis), and Orange Business will support access to the service for remote sites connected behind a third party converged MPLS network.
- Business Talk TDM access is end of Sales and no longer offered to new customers.
- Customers are able to manage Business Talk service (DID number assignment, site redundancy, routing management fee, etc.) through customer portal and API, with real-time ordering, provisioning, change management and reporting.

**NRC:**

- Business Together Cisco and Microsoft with break/fix & remote assistance operational services.
- Orange Managed: End-to-end service with equipment provisioning.
- Rental Model: End-to-end service including IPT core equipment (excludes IP phones).
- Resale Model: Customer owns equipment ordered directly or through a lease.
- Also assess, design, deployment, management.

**MRC:**

- MRC per user, per profile, per month based on the profile selected per user. Ten user profiles available for Business Together as a Service Cisco and seven for Business Together Microsoft. Minimum commitment of 500 Basic Profiles per region.

**Buying/Leasing Options for CPE:**

- Rental, resale and leasing options available.

**Handsets Included:**

- Endpoints 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 ten years

**Service Availability SLA:**

- Application Server Availability: 99.95% (on customer premises)

- Voice Quality SLA:**
- Voice Network Availability: 99.99%
  - MOS: 4.1
  - Post Dial Delay (PDD) = 4 sec; Business Talk offers high availability with enhanced voice QoS monitoring in place 24/7 and centralized voice reporting.

- Underlying Transport SLA:**
- Packet delivery: ranges from 0.1% to 0.4%
  - Jitter: 40 ms or less
  - Latency: less than 100 ms worldwide

- Other SLAs Available:**
- SLAs for hardware maintenance available at a country level for gateways, SBCs, and other premise-based equipment (excludes IP phones).

## UC SERVICES

- Rating:**
- Leader

- Audio Conferencing:**
- Audio and Web Conferencing for the MNC market, Audio and Web Conference for SMB Market. Audio conferencing cloud-based service can be made available on PGI or on Cisco Cloud Connect Audio platforms (CCA SP). Audio and Web conferencing with PGI is delivered based on infrastructure located in the three main continents with presence in U.S., UK, Netherlands, Germany, France, Singapore and Australia. Audio and Web conferencing Service with Cisco Webex Meeting relies on service platforms located in the U.S., Europe, and APAC.

- Web Conferencing:**
- Audio and Web Conferencing for the MNC market, Audio et Web Conference for SMB Market. Web conferencing service relies on Cisco Webex Meetings or PGI GlobalMeet Web technology. Orange also developed its own web conferencing service available for SMB customers. Orange relies on the comprehensive event services portfolio from PGI to deliver event and webcasting services.

- Video Conferencing:**
- Open Videopresence range, cloud-based or on-premises on-net video in 106 countries, Open Videopresence Flexible Premium cloud offer for all types of video equipment, Open Videopresence Management for customer dedicated infrastructure solution, managed by Orange. Orange Business Services is Cisco Global Gold certified partner and Poly certified Partner for video device. Platform support: Cisco, Poly, and Microsoft Teams Room including Surface Hub

- Geographic Regions of Bridging Exchanges:**
- Open Videopresence Flexible Premium has three Points of Presence (video bridges) located in France, U.S., and APAC.

- Video Software Clients Supported:**
- Cisco and Poly immersive/non-immersive video options; also supports Huawei and a range of other platforms including LifeSize, Avaya, Sony, and Aethra Telecommunications. Orange Business offers Video software clients are Web RTC technology based on Cisco Jabber Guest / Cisco CMS / Webex Teams client or Pexip client for France.

<b>Managed Telepresence:</b>	<ul style="list-style-type: none"> <li>Includes Cisco and Poly, as well as support for additional bridging platforms.</li> </ul>
<b>Geographic Regions of Bridging Exchanges:</b>	<ul style="list-style-type: none"> <li>Managed services can be deployed on customer infrastructure hosted in Orange data centres in Europe, US and APAC.</li> </ul>
<b>IM, E-mail and Desktop Integration:</b>	<ul style="list-style-type: none"> <li>Cisco Jabber, Cisco Webex Teams, Skype For Business Server 2019 , Microsoft Exchange, Office 365, Microsoft Teams; Microsoft is integrated with leading telephony vendors, along with leveraging Direct Routing; Cisco UC integrated with Microsoft Gmail; and SIP trunking. Federation available for IM and presence on request.</li> </ul>
<b>Softphone Support:</b>	<ul style="list-style-type: none"> <li>All major vendor softphones are supported including Avaya one-X, Cisco Jabber, Cisco Webex, and Microsoft Skype For Business and Microsoft Teams.</li> </ul>
<b>IP Contact Center:</b>	<ul style="list-style-type: none"> <li>Contact Center Access: Call collection solution offering public numbers (Toll, Toll-Free, Shared Cost in 120+ countries), with self-care and real-time ordering, provisioning, routing management and reporting available.</li> <li>Flexible Contact Center solutions based on leading vendors Cisco, Avaya, Genesys, and Nice, ranging from 30 to 1,000+ agents, deployed on-premises (Managed Contact Center Premium), private cloud (Managed Contact Center), hybrid or public cloud (Unified Engagement Suite).</li> <li>Flexible Contact Center: Hosted multichannel contact center solution based on Enghouse integrated with Business Together Microsoft. Anywhere 365 Enterprise Dialogue Management platform is a full native integration into Skype for Business and compatible with Microsoft Teams.</li> <li>Orange Business also supports contact center features from the Business Together as a Service Cisco HCS platform using Cisco UCCX and Unity.</li> </ul>
<b>Mobile Capabilities:</b>	<ul style="list-style-type: none"> <li>Alcatel-Lucent Cellular Extension; Avaya Extension to Cellular; Cisco Mobile Remote Access (MRA), Webex &amp; Jabber. Microsoft Skype for Business/Teams, supported for single number reach/client access as applicable, simultaneous ringing of desk phone and mobile, calling from mobile through IP PBX, and UC client on mobile phone for presence and IM.</li> </ul>

## IPT AND UC SALES AND SERVICE DELIVERY

<b>Rating:</b>	<ul style="list-style-type: none"> <li>Very Strong</li> </ul>
<b>Sales Strategy:</b>	<ul style="list-style-type: none"> <li>A focus on transformation and business benefits: 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.</li> </ul>
<b>UC Professional Services:</b>	<ul style="list-style-type: none"> <li>50 presales solution specialists and architects and 100 billable consultants in major countries provide consulting, assessment, design, project management, field engineering for deployment and break/fix in 165 countries. Log-In Consultants - 330 specialists for Virtualization, Cloud and the modern digital IT-Workspace.</li> </ul>

**Type of Partner Status Achieved:**

- Avaya: Platinum partner in Europe, Co-Delivery EMEA, APAC, UC Power Suite certified.
- Cisco: Global Gold partner; Global Resale Certified Partner, Master Collaboration, Managed Services Master Certification worldwide; Global Master Cloud Managed Services Certified, Global Enterprise Partner worldwide in 2019  
Microsoft: Global Partner Office 365, High Touch and Practical Guidance for Cloud Voice partner, Global Premier Support. Orange Business holds Gold competency for Communications, Collaboration & Content, Cloud Productivity and Application Development. Silver, Small and Midmarket Cloud Solutions.
- Poly: Global Strategic Partner, Platinum Partner in France.

**UC Delivery Capabilities:**

- Design: 128+ experts provide presales consulting and complex solution design.
- Implementation: 1,300 trained and certified project managers/coordinators and 1,256 field engineers.
- Maintenance and management: 350 service managers worldwide for ongoing support and management.