

Orange Mobile Enterprise - Global Enterprise Mobility

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Product Assessment - Global Enterprise Mobility Services



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Summary



Competitive Strengths

- Orange offers tailored enterprise solutions with optimized connectivity, cost and process management, implementation, project management, and accountability through industrialized service management.
- Orange offers comprehensive managed mobility services, differentiated by business and technical consulting, flexible public, hybrid or private cloud hosted options, increasingly virtualized network management, and integration with leading security and UCC services.
- Orange offers a personalized tariff for business users, “Optimized Mobility Management”, with profile-based voice and data bundles for travellers that are always optimized due to continuous consumption analysis.
- The Orange mobile footprint, including 28 Orange countries, and with members of the FreeMove and Bridge alliances, spans 100+ countries. Orange also offers access via iPass to more than 57 million public and campus WiFi hotspots in 120 countries.
- Orange has reinforced its service management proposition with dedicated resources for mobility, allowing it to offer customized solutions including integration with customers’ processes.
- Orange offers mobility alongside unified communications/collaboration, IT management, cloud services, and security, which are all elements of its vision of the ‘digital workspace.’



Competitive Weaknesses

- While Orange has a vertical approach in M2M/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.
- Orange’s global alliance partners are a key enabler, but Orange’s shift to a software defined network architecture remains a work in progress.
- Vodafone remains a strong competitor following its Project Spring investment and growing fixed line services, and Deutsche Telekom/T-Systems is a growing threat to Orange’s European A-end customer base.

Current Perspective

Orange is very strong in global managed mobility. Orange Mobile Enterprise (OME), the entity within Orange Business Services that focuses on MNC mobility and M2M/IoT, draws global customers with a comprehensive proposition from consulting to secure end of life device management. It includes tailored, optimized connectivity, process and cost management, EMM and enhanced security, application and content management, staging, and logistics. Orange has developed a flexible end-to-end service process to manage these activities across more than 100 countries, including partners. Orange offers EMS alongside peer services such as fixed voice, UCC, security, and mobile application development, both independently and as part of a wider digital masterplan to optimise the firm’s use of IT and network resources, and positions itself as a complete service integrator/orchestrator, supported by global service management.

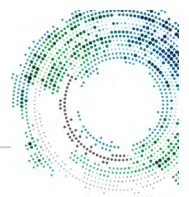
OME targets 600 top global accounts that need central governance, that are aligned with the Orange mobile footprint, and that have significant growth potential. Orange serves more than one million users among its target MNC customers, with approximately 83% situated in Europe, 5% in North America, 5% in Asia-Pacific, 4% in MEA, and 3% in Latin America.

Mobility is key to Orange’s innovation-oriented digital transformation strategy; the company acts both as a global operator and an integrator that orchestrates, operates, and optimizes end-to-end projects, frequently incorporating mobility as the enabling technology. Orange positions itself as ‘partner of the CIO,’ through the extension of its fixed wire offers into the mobile environment and application development capability.

Orange has extended its reach through its membership of the FreeMove and Bridge alliances that add European, Americas, and Asia-Pacific connectivity. FreeMove has enhanced how it works with partners; with FreeMove connectivity and SLAs as components, the lead operator provides its own value-added services and usually targets accounts where it enjoys a natural advantage.

Orange added to its capabilities in enterprise mobility and IoT in 2015/2016. It has a strong focus on application development through the Orange Application for Business (OAB) unit, with 2,700 employees (of which 900 are focused on mobility and IoT) providing system and application consulting, design, integration, and testing across a number of vertical markets, with a focus on customer experience. The unit leverages a partnership with Xamarin, a provider of cross-platform mobile app development software.

Orange offers strong TEM/cost and process management with a choice of TEM platforms, as well as MDM, with mobile application lifecycle management and delivery; a diverse mobile security suite; fixed/mobile convergence solutions that leverage the Orange wireline network; and mobility consulting and professional services. It is flexible in its delivery model, offering public, hybrid and private cloud as well as on-premise EMM platforms. Its “Optimized Mobility Management” tariff provides customers with customized plans or bundles based on employee profiles that are analyzed and optimized continuously. Offers include EMM (MDM, MAM, secure container, and enterprise app store) through MobileIron, available as a hosted or as a ‘behind the firewall’ service, as well as Samsung Knox as an option for extra device encryption. EMM has been enhanced by integration with Juniper SSL, ServiceNow, Cisco Jabber/WebEx, and Skype for Business.



Orange has reinforced its service management capabilities with dedicated resources in Europe and Mauritius to offer 24/7 support, industry certifications, MDM/M2M process alignment, and links to the Orange Business Services CSO organization to deliver a unified service and seamless user experience. This includes dedicated mobility project management, incident reporting for MDM and M2M/IoT customers, industry certifications, and continual performance monitoring including monthly SPI/SLA reports. These allow Orange to compete more directly against traditional IT service providers and to go after more deals led by consulting engagements on strategy, mobility audits, policy, expense management, programme management, and benefits management. The value proposition is to combine managed services and professional teams for a full suite of operational solutions to deliver, install, operate, and manage complete or elements of end to end solutions.

Orange has historically positioned enterprise mobility as a component in its workspace solutions portfolio (which also includes collaboration, IT management, VPNs, and security services), rather than in a separate silo. It now positions its mobility story as part of its ‘cloud-ready’ network, business continuity solutions, and end-to-end SLAs. Orange also positions mobility as an enabling solution alongside customer experience/contact center solutions, open video, SSL authentication, data analytics, cloud services and virtualization, and application development. In particular, Orange has integrated UCC and mobility so that customers can push the UCC client onto mobile devices via EMM and access the service with single-sign-on.

Strengths and Weaknesses

Strengths	Weaknesses
<ul style="list-style-type: none"> Orange offers tailored solutions with optimized connectivity, cost, and process management, along with consulting, audit, project design, build, implement, and manage, supported by industrialized “Service Management Hubs” in Europe and Mauritius. It also offers public cloud, private cloud, and on-site delivery options for managed mobility. 	<ul style="list-style-type: none"> Following the lead of large systems integrators, other operators are setting up vertical practices, or at least vertical overlay organizations to ensure they can understand their customers’ business issues and offer specific industry solutions. Historically Orange’s approach has been more horizontal, so to some extent it is playing catch-up, particularly against the large traditional ITSPs, but it notes that it has a vertical approach in M2M/IoT and already offers B2B apps in verticals like accounting, audit, commerce, etc.



<ul style="list-style-type: none"> • Orange offers comprehensive managed mobility services, differentiated by business and technical consulting, flexible public, hybrid or private cloud hosted options, increasingly virtualized network management, and integration with leading security and UCC services. Orange offers comprehensive managed mobility, including a choice of three TEM platforms for cost management and logistics, MobileIron-powered EMM and additional mobile security, and application and content management. This is fortified by end-to-end service management across a 100+ country footprint. There is also a focus on mobile application and development through Orange Applications for Business, offering vertical marketspecific mobile app development, applications integration, cloud solutions, and virtualization. • The innovative 'Optimized Mobility Management' offering features voice and data cost bundles based on user profiling. This includes TEM capabilities with Datanet, Tangoe or Asentinel that proactively manage usage through continuous consumption analysis of incountry offers to ensure an always optimized offer. • Orange provides cellular connectivity in 100+ countries, 28 on-net and 77 via its membership of the FreeMove and Bridge alliances for Europe, Americas and Asia-Pacific. FreeMove was restructured to allow the lead operator (with a pre-defined set of MNC customers for each alliance partner) to build value-added services around solutions that leverage FreeMove partners' physical infrastructures and harmonized commercial terms, providing uniform pricing, quotations and SLAs. Orange also offers access to more than 57 million public and campus WiFi hotspots in 120 countries through iPass. 	<ul style="list-style-type: none"> • Other Europe-based operators still provide significant competition. Orange's global alliance partners are a key enabler, but it shares this with Deutsche Telekom in particular. Orange depends on them to provide client MNCs with truly global mobile connectivity services. While this dependency is also true of many operators, it still pushes Vodafone in front for some deals due to its larger footprint of on-net mobile assets. However, recent service management enhancements mean Orange can deliver customized solutions by building on the existing infrastructure and facilitate new implementations (e.g., ticketing, call routing, centralised ordering, etc.). • Vodafone remains a strong competitor following its Project Spring network upgrade, given perceptions that offerings from a single provider provide a more cohesive, consistent global solution set. However, Orange claims that it can now deliver a unique service whereby it manages the networks of competitors on behalf of the client, even though it might not provide connectivity. In addition, Orange notes that it can offer seamless integration of fixed-mobile networks and IT infrastructure.
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<ul style="list-style-type: none"> • Orange has “industrialized” its service management proposition with dedicated resources based in Europe and Mauritius, industry certifications, MDM/M2M process alignment, and links to the Orange Business Services CSO organization in order to deliver a unified service and seamless user experience. The mobile service management packs provide several levels of customization; the standard pack includes regular service reviews to proactively help customers to manage mobility globally. The premium pack includes a dedicated mobility project manager, a dedicated customer service manager, 24/7 service desk, customized reporting, central ordering, and SPI/SLAs. • Orange has many complementary services on the ‘wireline side’ of the house, which the service provider has extended to mobile endpoints. These include UCC, video conferencing, cloud services, and virtualization. These services work together to form Orange’s view of the ‘digital workspace’, and are managed all together from a central unified service management platform. 	
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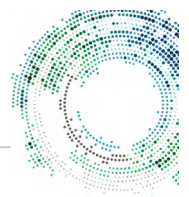
Metrics

Enterprise Mobility Services Infrastructure

<p>Strategic Relationships/ Platform Partners</p>	<p>Device Management Premium is the Orange EMM solution based on MobileIron or Airwatch. The platform is hosted and managed in Orange Cloud with Business VPN connectivity to secure the flows between the EMM platform and customer IT components (Active Directory, PKI etc.). Orange also supports other architectures such as on-premises or hybrid cloud. Customers can benefit from MDM, MAM as well as MCM features and also from access control to inhouse and cloud services or resources (e.g. Sharepoint, Salesforce, Office 365 etc). Active Directory and device attributes are used to dynamically assign different configurations and policies, one application being corporate versus employee devices. Orange implements, manages, upgrades the MobileIron components and provides L1, L2 and L3 support. New software is validated before to be deployed to ensure a better quality for customers. Orange’s default support provides IT-to-IT helpdesk with the option to provide some end-user support.</p>
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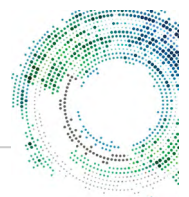
<p>Application management</p>	<p>The Orange EMM solution based on MobileIron provides application distribution and update either through pull mechanism from a corporate app store, or with a push mechanism. Applications include enterprise collaboration services that can be also provided by Orange. Application control enforces corporate security policies and applies automatic remediation if for example a disallowed application has been installed or a mandatory application has been removed. If enabled, it is possible to remotely configure for Apple and Android devices. However, Single sign-on simplifies access for users. Orange Applications for Business, which target customer experience (contact centres), data analytics and IoT, increases Orange's range of applications across a set of verticals.</p>
<p>Security management</p>	<p>Protection of devices is ensured with a set of MDM configurations and policies including but not limited to activation of device encryption, device passcode, and other restrictions. Corporate data can be protected on the device with containerization, and traffic secured with per-application VPN. After checking the device's compliance, the secure gateway that terminates the per-app VPN will grant access to required resources. MobileIron AppConnect, Android for Work or/ and Samsung Knox are some of the containerization options. Corporate data can be wiped remotely or with ondevice compliance mechanisms. The Orange service secures the access to customer on-premises (e.g. Sharepoint, CIFS or webdav servers) or cloud (EFSS, Salesforce, Office365) services; secures downloaded documents on the device; and provides secure on-device version control. Orange can provide a bundle of EMM and Flexible Storage (Orangemanaged EFSS) with traffic secured over Orange Business Galerie. To provide additional security, its managed platform can be integrated with either Orange or customer malware and threat detection and prevention solutions such as FireEye, Lookout, Check Point, and Wandera. The Orange service allows customers to push role-based security, containerization, data loss prevention (DLP) and access control policies (ACP). Orange can set up and handle the integration with customer IT components and manage the system according to the customer's policy details.</p>
<p>TEM and logistics Management</p>	<p>Orange offers a Telecom Expense Management solution using a choice of platforms (Datanet, Tangoe, Asentinel) that provide cost allocation, real-time TEM and usage management, end user profiling and optimization, invoice audit and management based on network contracts, advanced reporting capabilities, central ordering and inventory management, contract inventory for mobile and other assets (e.g. fixed voice) and web-based ordering. Orange has capabilities for central logistics service for mobile devices (handsets and tablets) and accessories, including Knox customisation. The solution combines a portal and logistic platform where clients can manage their customized mobile device catalogue (smartphone, tablets and other equipment), and ordering and delivery of devices across Europe. Future development includes staging, kitting and leasing solutions.</p>



Other (e.g., device virtualization, performance management)	Orange positions mobility alongside other strategic services such as customer experience/contact center solutions, open video, SSL authentication, data analytics, cloud services and virtualization, and application development. In particular, UCC and mobility have been integrated, with the ability for customers to push the UCC client onto mobile devices via EMM and access the service with Single Sign-On.
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Operations

Device lifecycle management	Based on MobileIron, Orange provides customers with a unique, customised managed service in a private cloud, onpremises or public cloud. This provides centralised configuration and policy enforcement, a secure mobile gateway (on-premises or in the cloud), full integrations with Juniper SSL, ServiceNow, Cisco Jabber/WebEx, and Microsoft Skype for Business. Devices are protected against malware and other threats with Orange Cyberdefense, while content can be encrypted. Orange will also consult on policy definition, implementation and integration of devices with existing infrastructure and services like Salesforce.com and Cisco ISE.
Tiered Service packages	Orange offers three levels of managed services: international implementation, international service, and mobility project management, which respectively coordinate migration, quality of service, and tool development in association with FreeMove and partners. Orange has defined several levels of Mobile Service Management packs; all new customers benefit from the standard pack. The standard pack includes a web portal, standard and custom reports, central ordering, global SLAs, service performance indicators, incident management and executive reports. It also includes regular service reviews to help customers proactively to manage mobility globally. The premium pack includes dedicated mobility project management, a dedicated customer service manager, 24/7 service desk, customized reporting, central ordering, SPI/SLA. On top of these, customers can ask for customized solutions including integration with customers' processes.
Service Provisioning	Orange offers three levels of managed services: international implementation, international service, and mobility project management, which respectively coordinate migration, quality of service, and tool development in association with FreeMove and partners. Orange has defined several levels of Mobile Service Management packs; all new customers benefit from the standard pack. The standard pack includes a web portal, standard and custom reports, central ordering, global SLAs, service performance indicators, incident management and executive reports. It also includes regular service reviews to help customers proactively to manage mobility globally. The premium pack includes dedicated mobility project management, a dedicated customer service manager, 24/7 service desk, customized reporting, central ordering, SPI/SLA. On top of these, customers can ask for customized solutions including integration with customers' processes.



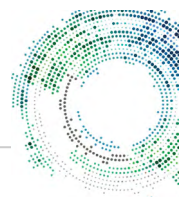
Client Care/ Helpdesk Services	Orange has a dedicated ITIL-aligned (V3) service desk with 24x7 support in English and French for customers' fleet managers; local language support is available on request. Incident management includes M2M (Malima and DCP – L1), day-to-day operations follow-up and reporting, and follow-up management of customer contracts and incidents. Continual performance and quality monitoring provide the customer with monthly and quarterly savings opportunities.
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Mobile Applications

Custom Development Tools	
Custom Development Services	Orange can integrate mobility services with customers' ERP and UCC systems including Microsoft, SAP, Cisco, Genesys, Avaya, data analytics engines e.g. Splunk, social media and message systems, etc., as well as ideation, definition, coordinate, build, deliver and manage custom SaaS projects.
Mobile Security Apps	Orange has more than 1,000 security experts and operates two global cyber security operations centres. Orange is rolling out a global software defined network, the better to monitor and manage application performance levels across its estate, with increasing focus on virtualising connected end points and managing them from the cloud to raise security levels.
Top Packaged Applications	
Other (e.g., Workplace as a Service, Mobile Messaging)	Orange provides Mobile Workspace definition through mobility consulting and solution design. It can integrate access to corporate applications and communications & collaboration tools (such as UCC) whatever the device. Applications are pushed on mobile devices using the EMM solution and accessed through Single Sign-On to simplify the user experience.

Professional Services

Business Consulting	Orange has developed its own project and program management methodologies to strengthen its mobility solutions with consulting engagements on strategy, mobility audits, policy, expense management, and benefits management.
Technical Consulting	Orange delivers technical consulting services through its global professional services teams. It combines the teams and managed services to provide a full suite of operational solutions, including maturity audit, consulting, and design, through deployment and logistics, to application management, management services, analytics and optimization, and support.



Systems Integration	Orange is increasingly using multiskilled teams in cooperation with users to develop integrated solutions based on Orange’s chosen product set (as well as third party products if required) using agile processes. The offer includes a Try Before You Buy pilot to help customers adapt to social media in the workplace. An Orange-branded ServiceNow integrated portal for mobility management allows customers to use an industry-standard solution to manage all elements of mobility such as user creation, approvals, device catalogues, and services such as TEM and MDM. In addition, it provides full integration of the EMM solution with Juniper SSL, Cisco Jabber/WebEx, Microsoft Lync.
Custom Dashboard/ Portal Development	Orange is increasing the extent to which it provides customised, automated dashboards and portals to improve its customer service by speeding things up, and giving customers greater autonomy in responding to changes in their environment. It is also increasing the use of real time data to generate customised analytics to give customers better insights into their usage, as well as improve Orange’s responsiveness to incidents and predicted incidents.

