

# Orange Business APAC Analyst Day 2025: Continuous Innovation and Outcome-based Propositions Driving Business Momentum



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## Summary

Orange Business continues to excel in APAC, delivering outcome-based digital solutions, driven by its robust infrastructure, service capabilities and broad partner ecosystem.

## Issue

In a recent business update to analysts in the Asia-Pacific (APAC) region, Orange Business reported robust revenue growth especially in markets such as China, India, and ASEAN, Japan, and Korea (AJK) where it saw double-digit revenue growth. The company is also experiencing robust growth across connectivity, cloud, and cybersecurity. Orange Business has in recent years shifted its sales approach towards four strategic value propositions: digital infrastructure, customer experience, employee experience, and operational experience; and this is bearing fruit. With its investments in platforms, people, and partnerships, the company is well-positioned to help enterprises navigate their challenges in modernizing their digital infrastructure, transforming their operations, and adopting AI. This report discusses the progress Orange Business has made in the APAC region and areas where the company can become more competitive.

## Key Takeaways

- Orange's global B2B unit continues to experience strong growth momentum across the region in the first half of 2025.
- Orange Business has rapidly growing connectivity (Evolution Platform), cloud, and cybersecurity businesses. It is also developing AI capabilities.
- The provider has strengthened its go-to-market with outcome-based propositions through customer experience (CX), employee experience (EX), and operational experience (OX) messaging. Success has been demonstrated by steady growth in revenue, bookings, and customer references.
- There are few areas Orange Business can consider such as carrier partners in emerging markets like ASEAN, wider promotion of its AI capabilities (e.g., Live Intelligence), and vertical practice.

## Perspective

### Current Perspective

#### Orange Business' Growth/Momentum in APAC

As Asia-Pacific continues to be at the forefront of global digital innovation, Orange Business has positioned the business within the region to look beyond connectivity and assist their enterprise customers in their transformation journey, delivering outcome-based digital and managed services solutions. Backed by its global capabilities and local knowledge, the company has established a strong business in the region, making it the biggest market for the company outside Europe.

With each country being different, the company has adopted market-specific strategies in each territory which have delivered strong growth momentum for the business. Orange Business continues to play to its strengths, focusing on industries where it can deliver strong outcome-based deliverables. For example, in Australia and New Zealand, the carrier is focused on financial services, federal government, and mining segments. In China and Japan, the carrier is seeing some success in supporting the automotive sector, including electric vehicles and connected car manufacturers that are looking to expand into Europe and the rest of APAC. Banking and financial services is also a growing industry focus in Singapore and Malaysia. At the same time the company's APAC operations also support its French MNC customer base in the region.

Orange's global B2B unit continues to experience strong growth momentum across the region in H1 2025, with double-digit growth in India being the standout after the company completed a major transformation of its operations in the region, and aligning its focus to be consistent with other regions on system integration and digital integration.

#### A Strong Digital Infrastructure Foundation and an Expanding Partner Ecosystem

Orange Business is shaping up to be a digital infrastructure powerhouse, which covers connectivity, cloud and cybersecurity. The company has been developing the Evolution Platform, its Network-as-a-Service (NaaS) solution for some time. After onboarding some customers, and fine-tuning the platform, the company is now ready to scale the adoption. Globally, it has 43 live PoPs, over 200 customers on the platform. Customer numbers are increasing rapidly as the company puts its workforce through a training and certification program which helps them better articulate the business value of Evolution Platform. Besides using Evolution Platform for multi-cloud connectivity, Orange Business has indicated that customers are now using virtual network functions including security and SD-WAN gateways, replacing physical appliances to improve operational agility.

Orange Business also has a rapidly growing cloud business in APAC (up 48% YoY in H1 FY2025), helping customers modernize their applications and migrate them to the cloud. It has strong global partnerships with both Microsoft and AWS. The company delivers more flexible and cost-effective multi-cloud connectivity through Evolution Platform. Moreover, Cloud Adviser, its cloud management solution, helps customers better manage their costs and performance. With Cloud Adviser 2.0, there are added capabilities such as IT asset management, FinOps, and sustainability. This enables clients to optimize their cloud costs and more accurately forecast their spending, as well as gain visibility into their carbon footprint from data centers to devices. Moreover, the company also offers a range of options including co-location, private cloud for sovereignty requirements, Compute-as-a-Service, and GPUaaS.

Orange Cyberdefense, the cybersecurity arm of Orange Business, plays a critical role in delivering integrated cybersecurity services across the APAC region, with a market experiencing sustained double-digit growth. Leveraging its global capabilities and vendor partnerships, the company is able to offer a broad portfolio of security consulting, secure-by-design solutions, and managed security services. It is gaining strong traction in key areas such as managed secure access and security service edge (SSE), managed detection & response (MDR), and industrial security, including the protection of IoT systems.

Additionally, Orange Business is seeing growing demand for its security consulting capabilities, particularly in supporting enterprises as they secure their AI environments and integrate cybersecurity into their digital transformation strategies.

A key focus for Orange Business is expanding its partner ecosystem and stepping up its efforts to jointly go-to-market with partners. It has strategic partnerships with technology vendors such as Palo Alto Networks, HPE, Cisco, and Huawei; as well as other focus partners such as AWS, Equinix, and Fortinet. Orange Business co-innovates with these partners to offer new solutions for customers. For example, it has developed the GPUaaS with Equinix and HPE, OT Security-as-a-Service with Cisco, and Cloud Adviser 2.0 with Flexera. Orange Business is also engaging with telcos and system integrators for go-to-market activities. For example, it is working with KDDI as a sell through partner for connected IoT services and this has helped to drive its IoT business in Japan especially in the automotive sector. The company is also working with system integrators, for example with Capgemini as a sell through/sell with partner. It has engaged enterprises together with Capgemini to showcase the value propositions of a combined Capgemini and Orange offer.

### ***Perspective***

Orange Business' Evolution Platform is a more mature NaaS platform than its peers. This is in terms of functionality and customer adoption, which gives the company a competitive advantage over other network providers including global carriers. Evolution Platform also serves as an important digital infrastructure foundation forming a bridge between network, cloud, and security. This is also a key platform that helps Orange Business to drive its partner ecosystem expansion. There are already various products from networking and security vendors embedded in the platform. Orange Business can also offer Evolution Platform through other telcos and system integrators. Most domestic telcos and system integrators do not have a NaaS platform, giving Orange Business opportunities to offer its Evolution Platform to enterprises through partners.

For cost, performance and sovereignty reasons, enterprises are rebalancing their workloads between public and private environments. Rising costs remain an issue for enterprises as the adoption of cloud services grows. There are also increasing challenges around data protection to meet regulatory and sovereignty requirements. In some markets where there are regulations requiring sustainability reporting (e.g., Australian Sustainability Reporting Standards), enterprises will need to factor in carbon emission when deciding where to host their IT. Orange Business is well-positioned to address the challenges enterprises are facing with its cloud connectivity, Cloud Advisor 2.0, as well as different options to deploy hybrid IT. In particular, the FinOps and GreenOps functionality within Cloud Advisor 2.0 allows Orange Business to elevate its engagement with customers, deliver business values in terms of better cost management and forecast as well as overcome the challenges of carbon reporting. It can also work with clients to use their cloud cost savings to fund other strategic initiatives including cybersecurity protection and IT observability.

Moreover, the shifting of workloads between public cloud and private environment continues as enterprises look to meet sovereignty requirements and manage their VMware migration. Orange Business is also able to meet different customer needs through its broad partner ecosystem which includes AWS (Outpost), Microsoft (Azure Stack Edge), Nutanix, Dell, HPE, and Red Hat. The demand for private cloud and cybersecurity will continue to rise as enterprises experiment and deploy AI/GenAI-powered solutions. This is a boon for Orange Business' digital infrastructure business which also includes a GPUaaS offer if that is required by customers. However, the company appears to be more involved in the infrastructure at this stage and less so in developing AI use cases and driving AI-powered innovation. This can limit its visibility into the challenges enterprises are facing when adopting AI. Ultimately, enterprises need a clear strategy in adopting and scaling AI, which should consider upfront the impact on their digital infrastructure across connectivity, cloud and cybersecurity.

## Value Propositions - CX, EX, and OX

Based on the strong infrastructure and wide partner ecosystem discussed above, Orange Business moves up in the value chain with three main propositions of CX, EX, and OX. This aligns with the growing enterprise needs to leverage technologies to meet their business goals.

EX and CX are based on communications and collaboration services. CX includes contact centers, voice services, CPaaS, and marketplaces while EX focuses more on collaboration, such as conferencing and video solutions. Orange Business has a broad ecosystem supporting various traditional and emerging vendors including Genesys, Huawei, AWS, Microsoft, Cisco, Zoom, and ServiceNow. Orange also has broad service capabilities, from consulting to integration and management, as well as robust framework that addresses enterprises across different maturity and needs. Further, the provider also continuously enhances its product capabilities with new features to keep up with market demand. This includes multi-vendor video modernization, API support, RCS and email support in its CPaaS, and Live Intelligence (a cloud-based middleware platform with preconfigured LLMs). The wide partner ecosystem, combined with strong product and service capabilities, enable Orange Business to offer modular and integrated solutions. This provides enterprises with flexibility and interoperability across different vendors. In line with Orange Business' overall momentum, its CX and EX business achieved its revenue target in 2024 and is on track to reach 115% of its goal for the first half of this year. In APAC, the growth was driven by video managed services (up by 15%), voice and collaboration (7%), and CPaaS (5%). The provider also shared various references across diverse industries including MNCs, tech companies, universities, global retail brands, manufacturers, content/media providers, and banks.

OX is mapped to IoT and OT solutions. Orange Business's OX portfolio comprises IoT connectivity and smart industries use cases. Underpinning its OX offerings is its comprehensive capabilities across the stack, from IT-OT devices/gateways, access layer (i.e., cellular, MPN, industrial LAN, WiFi, and satellite) to platform, security, cloud, edge, ITSM, analytics, and application development. On cellular access, Orange operates as a mobile operator in approximately 20 countries and its roaming agreements with over 500 operator partners enable it to offer seamless global connectivity at competitive prices. Orange Business' broad capabilities are also driven by its wide ecosystem, not only with technology vendors including Ericsson, Nokia, Cisco, HPE, Dell, Starlink, OneWeb, and AWS, but also OT players such as Schneider Electric and Quuppa. Orange's consulting-led approach is the foundation of its OX business, with solutions tailored to business challenges and needs. The provider also has other service capabilities, including integration and managed services. Besides, Orange continues to add new capabilities to its OX portfolio and expand its 'smart industry' solutions with new use cases such as surveillance, worker safety, and mobile private networks. This enables the provider to address the rapid change in customer needs especially in IT-OT convergence requirements. Similar to EX and CX, OX business well exceeded its 2024 target. The revenue has been increasing strongly at high double-digit growth rates within the last four years. The success is also demonstrated by Orange's expanding list of customer references across multiple verticals including automotive, transport, and other industries.

## Perspective

The EX, CX, and OX value propositions are crucial for Orange Business to ensure sustainable business growth. Enterprise ICT and business functions are becoming more aligned. Business objectives are increasingly included in ICT RFPs. This is a fundamental shift for enterprises to drive business, operational efficiency, innovation, and agility. Having a strong ICT and business alignment also enables enterprises to stay ahead of the competition and keep up with rapid changes in consumer behavior. Orange's success in these propositions is demonstrated by its solid business growth as well as growing customer references. The success is also underpinned by its robust infrastructure across connectivity, cloud, and cybersecurity as well as AI and data analytics. Besides, its wide partner ecosystem and strong service capabilities are also key in driving its CX, EX, and OX business. This strategy sets Orange apart from its telco competitors and closes the gap with other IT service providers.

Orange Business' performance in EX and CX is impressive as it is seeing growth in services like voice and collaboration while the market is maturing and/or declining, and some global/regional carriers are losing market share. Orange Business has moved up the value chain, focusing on EX and CX propositions to address business needs instead of selling discrete products. The provider is also driving various innovations leveraging emerging capabilities such as AI/GenAI, APIs/CPaaS, video, multi-vendor integration and cloud-based solutions. The collaboration, conferencing, and contact center markets are fairly mature while the shift is from legacy on-premises solutions to cloud-based solutions. However, there are greater opportunities around EX and CX themes which include a broader set of capabilities (e.g., customer data platform, CRM, CPaaS, and UX monitoring). In addition, AI is already playing a more prominent role in customer engagement and assisting the workforce in various tasks. Orange can co-innovate with customers to embed AI into EX and CX. Cybersecurity and data privacy is another key area that Orange Business should highlight in its EX and CX solutions. AI vulnerabilities are a major concern, and AI-led threats and social engineering attacks have become more prevalent and sophisticated in recent years.

On OX, the revenue is still largely driven by IoT connectivity. However, Orange's direction in expanding its smart industries portfolio can accelerate its OX business in the mid- and long-term. There is a huge potential in the industrial IoT solution market led by AT&T, Telefonica and Vodafone (for more, please see Global Industrial IoT Services: Competitive Landscape Assessment, July 18, 2025). As ICT and business functions become more aligned, enterprises are increasingly considering end-to-end IoT solutions that are tied to their business objectives. Orange Business has underlying capabilities such as application enablement platforms, OT partners, and professional/consulting services, but it needs to develop vertical propositions tailored for industrial needs. There are several high potential verticals in APAC such as transport, manufacturing, mining, energy, and construction.

## Recommended Actions

### Vendor Actions

- In some markets such as those in Southeast Asia, many telcos do not have the scale and expertise to develop digital platforms and more complex ICT solutions such as NaaS and cybersecurity. They are becoming more open to working with partners including foreign carriers to fill any gaps. For example, Maxis has adopted Singtel's Paragon (5G), and Vodafone's IoT platform to serve customers in Malaysia. TM and CelcomDigi have also worked with Telefonica Tech to strengthen their cybersecurity solutions. Orange Business can engage telcos in various countries in Asia, and Asian telcos should also consider working with Orange Business for supporting their enterprises' digital infrastructure requirements.
- Orange Business should consider engaging customers in AI discussions either directly or through system integrator partners. The company should promote its Live Intelligence, which offers a range of out-of-the-box GenAI solutions for enterprises. However, this will be a consulting-led engagement and Orange Business should form a small team to co-innovate with partners and customers. This is important for having a good understanding of customer pain points in AI adoption and identify areas where Orange Business can play a role especially in delivering an AI-capable digital infrastructure.
- Multivendor integration/interoperability and security are crucial components of a communications and collaboration solution. Orange Business can highlight its strong credential and expertise in helping customers modernize their communications and collaboration solutions. However, it should also expand its consulting capabilities to engage customers in deeper CX and EX design focusing on end-user experiences. This can also include partnering with other service providers with stronger consulting capabilities but limited technical and delivery capabilities.

- As Orange Business is strengthening its smart industry capabilities, it should consider developing vertical propositions and target high-growth industries in APAC. This includes manufacturing, mining, energy, and construction. Besides, sustainability propositions are also key to help enterprises achieve their ESG goals. (e.g., reducing power consumption in facilities).