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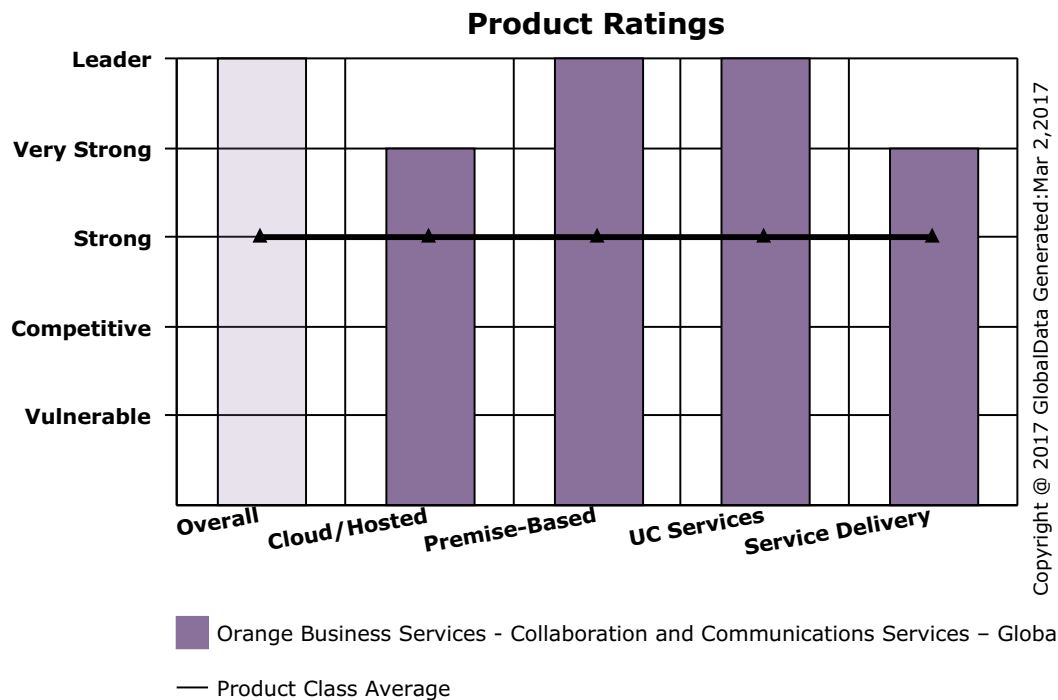
# Orange Business Services - Collaboration and Communications Services – Global Enterprise

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## SUMMARY

**Product Ratings**



Legend:
- Orange Business Services - Collaboration and Communications Services – Globa
- Product Class Average

**Competitive Strengths**

• Orange Business delivers full-service UCC cloud based solutions in 80+ countries, and can add a new country in two to five weeks.

• Already strong customer support is becoming even stronger as Orange Business puts the end-user experience at the forefront of its UCC offer.

• Orange Business has established strong momentum for its Business Together as a Service cloud offer on the back of an increasingly simplified and agile global network infrastructure and global data centres, which should broaden its appeal to MNCs.

• Orange Business' comprehensive service reach, product set and growing service enablement agility make it an attractive option for MNCs that need a consistent global service.

• Orange Business' self-service portal provides visibility and management features for B2GaaS customers and supports 32 languages.

**Competitive Weaknesses**

• Orange Business' global expansion plans include targeting emerging markets. These regions are ripe for business, but may take time to bear fruit as users develop their demand for more sophisticated technical solutions.

• Orange Business' choice of UCC platforms, Cisco HCS, Cisco Spark and Microsoft Skype for Business, is table stakes in the MNC market. Managed mobility, customisation, service delivery and TCO provide competitive differentiators.

**Current Perspective**

**LEADER**

Orange Business Services (OBS) is a market leader in the global UCC market for MNCs, because of its very competitive coverage, as well as its investment to convert quickly to a virtualized, all-IP network, which is making global converged solutions easier and quicker to implement. Legacy and IP voice/UC contribute around 23.4% of Orange's Enterprise revenues (FY 2016) with the mix quickly moving towards IP-based services. The company notes that in the French market in 2016, legacy voice services declined by 4.8% whilst 'XoIP' services grew by 6.6%.

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 has strengthened is Microsoft offering with 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. In addition, Orange inked a deal with Akamai to enable higher speeds, greater reliability and more secure delivery of content and services for enterprises, thus addressing top areas of concern for CIOs, but the deal is non-exclusive and other Tier 1 operators can match it. Other supported systems include X Medius, Mind CTI, Sonus, Landis, AudioCodes, Peters Connect and Avaya for UC; Cisco WebEx and CMR, PGi GlobalMeet, Cisco CCA for conferencing; Jive and SharePoint for sharing; and Cisco, Polycom and Smart for video. OBS' primary choice of UCC delivery platforms, Skype for Business and HCS, is now table stakes for operators seeking MNC business. MNCs can rightly ask for more differentiation, which OBS is providing via faster capability turn-ups (it can switch on a country in two to five weeks), more flexibility in solving users' communications problems (buying in rather than building enabling systems), and leveraging improved internal network monitoring and application management tools to create better user experiences.

## STRENGTHS AND WEAKNESSES

**Strengths**

• OBS delivers UCC as on-premises managed, cloud-hosted and hybrid services under the Business Together brand in 32 languages. It offers hosted Business Together based on Microsoft Skype for Business (80+ countries) and/or Cisco HCS (82 countries), and Cisco UCM for on-premises

**Weaknesses**

• Orange's decision to centre its hosted UC portfolio on Cisco and Microsoft is understandable and not a weakness per se; however, it does make it harder for OBS to differentiate its portfolio and may leave the provider vulnerable to OTTs and other disruptors.

managed UCC. OBS has announced a highly automated hosted Skype for Business service for SMEs, which could win back customers lost to independent VoIP/UCC vendors.

• OBS' already first-class customer support, delivered by some 20,000 staff in 166 countries, may improve as it seeks to revitalize customer relations through an intense focus on service simplification and agility through the use of digital technologies to improve end-user experiences.

• OBS' Business Together has established strong momentum in the UCC market. The provider currently supports 1,000,000+ Microsoft Skype for Business users in more than 50 countries, including 350,000 Skype for Business Enterprise Voice users; it serves 93 clients in 82 countries via its Cisco HCS platform. OBS anticipates this growth to continue as it extends services into new Latin America, Asia-Pacific and EMEA countries.

• Business Talk SIP trunking reaches 154 countries supported by seven SIP data centres worldwide. This gives OBS one of the most comprehensive coverage footprints in the world, but it can still quote a single global price per user. OBS provides a full suite of UC solutions including video, mobile, network, security, M2M and consultancy, thus providing MNCs a one-stop-shop experience, which Microsoft recognized in appointing OBS as an Elite Partner for its Skype for Business launch.

• Self-service capabilities are an important differentiator when customers are evaluating services. While they may want the provider to manage services, many enterprises require a level of visibility and control. OBS has created a single portal for Business Together-aaS customers, regardless of the underlying platform, and made that portal available in 32 languages.

• OBS' market profile in the lucrative and fast-growing North American market remains relatively low compared to incumbents AT&T and Verizon, and nothing in its parent's new strategy statement suggests a change.

• Orange's Africa-Middle East division has more than 110 million mobile subscribers (out of a group total of circa 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.

# Metrics

| CLOUD/HOSTED SOLUTIONS | |
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| **Rating** | Very Strong |
| **Service(s) Name** | Business Together as a Service (B2GaaS), Business Together Cisco, Business Together Microsoft UC, Business Talk |

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| **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. |

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| **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%<br>MOS: 4.1<br>Call Completion Ratio (CCR) = 99.8%<br>Post Dial Delay (PDD) = 4 sec |
| **Underlying Transport SLA** | Packet delivery: ranges from 0.1% to 0.4%<br>Jitter: 40 ms or less<br>Latency: less than 100 ms worldwide |
| **Other SLA** | Available on supporting premises-based infrastructure such as voice gateways |

## MANAGED PREMISES-BASED SOLUTIONS

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| **Rating** | Leader |
| **Service(s) Name** | Business Together supported by Business Talk (SIP trunking), PBX Management |
| **Geographic Reach** | 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.<br>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.<br>Managed PBX in 213 countries. |
| **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 |

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| | Siemens) and Mitel Managed Premises-based Solutions. |
| **Access Options** | SIP trunking: Access via MPLS, customers can also use symmetric DSL, and Orange Business will support access delivered via a third party. 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. |
| **NRC** | 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** | 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** | Voice Network Availability: 99.99% MOS: 4.1 Call Completion Ratio (CCR) = 99.8% 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** | Not available |

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| **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** | 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. 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. Platform support: Cisco CTX, Polycom. |
| **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. |

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| **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

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| **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<br>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<br>Microsoft: Global Partner, , Microsoft High Touch and Skype Operations Framework partner Premier Support for Skype for Business<br><br>global partner, Orange Business holds Gold |

global partner. Orange Business holds Gold competency for Communications, Collaboration & Content, Cloud Productivity, and Silver for Application Development.
Polycom: Global Strategic Partner, Platinum Partner in France

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| **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. |