



Gary Barton

Orange Business Services - Collaboration and Communications Services (Global)

August 30, 2018

PRODUCT ASSESSMENT REPORT - GLOBAL COLLABORATION AND COMMUNICATIONS

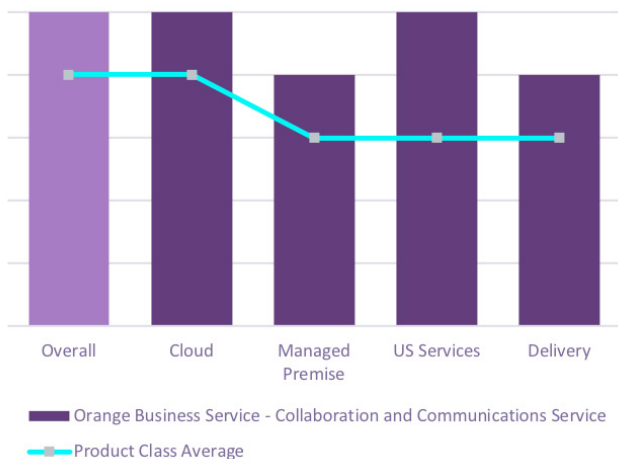
REPORT SUMMARY

OBS's UC portfolio offers global Microsoft and Cisco capabilities and provides differentiation through its extensive coverage, consultation and user adoption programmes. OBS also has compelling R&D capabilities for UC including for APIs and CPaaS.

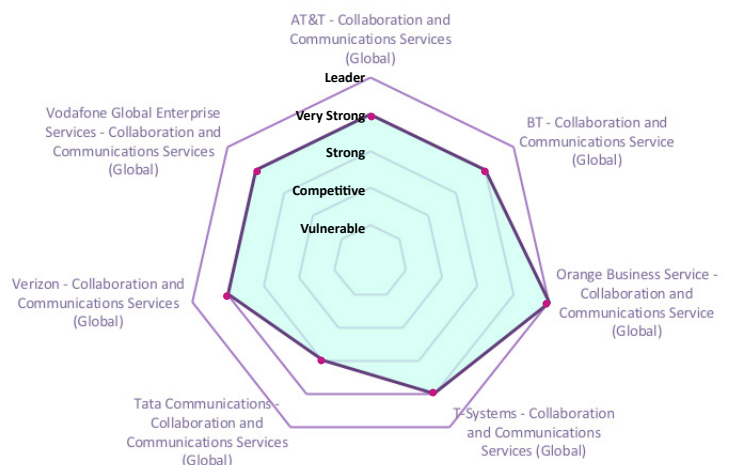
SUMMARY



Product Ratings



Copyright © 2018 GlobalData Generated: Sept 11, 2018



WHAT'S NEW

- **June 2018:** Orange has partnered with Microsoft to deliver Direct Routing for Microsoft Teams users. Direct Routing allows users to make and receive calls in Teams.
- **February 2018:** OBS launched Teaming, a new OTT offer based on BroadSoft; initially available in France, the service offers messaging, meeting and calling for the small enterprise market.
- **December 2017:** OBS launched Open Labs, a network of technology equipped locations used for co-innovation, ideation and proof-of-concept generation.
- **December 2017:** OBS launched End User Adoption, a new program delivering a lifecycle approach to increase user adoption with analysis and user feedback to enhance future offers.

PRODUCT OVERVIEW

Product Name	Business Together as a Service	
Description	A suite of hosted and on-premises voice, unified communications, collaboration and contact centre solutions primarily based on Microsoft and Cisco	
Components	<ul style="list-style-type: none"> • Business Together as a Service , Business Together Microsoft • Business Talk • Business VPN Galerie 	
Key Customers	<ul style="list-style-type: none"> • Amcor, Heineken, Japan Tobacco International 	
Key Rivals	<ul style="list-style-type: none"> • Accenture • AT&T • BT • DXC Technology • IBM Global Services 	<ul style="list-style-type: none"> • T-Systems • Tata Communications • Telefonica Business Solutions • Verizon Enterprise Solutions • Vodafone Global Enterprise

ESSENTIAL ANALYSIS

Strengths	Limitations
<ul style="list-style-type: none"> • Global Presence: OBS offers hosted Business Together based on Microsoft Skype for Business (80+ countries) and/or Cisco HCS (82 countries). Business Talk SIP trunking reaches 160 countries for on-network calling, as well as 78 off-net, and provides local voice service with DID porting in 50 countries. • Customer Experience: OBS's already first-class customer support, delivered by some 21,316 staff in 166 countries, is improving as it seeks to revitalize customer relations through a focus on service simplification and the use of digital technologies to improve end-user experiences. 	<ul style="list-style-type: none"> • OTT Erosion: OBS has acknowledged that OTTs represent a particular threat to its UC revenues; this means that overall voice and UC revenues are under pressure despite strong growth in hosted UC sales. • Africa and the Middle East: Orange's Africa-Middle East division has more than 127 million mobile subscribers (out of a group total of approximately 2078 million), and it offers 4G in thirteen countries in the region. Although OBS has signed Business Together customers in Africa, growth remains limited versus the potential opportunity.

- **CPaaS:** OBS is establishing itself as a provider of CPaaS solutions. Using its Orange Labs R&D capabilities and an ecosystem of partners, OBS 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.
- **UC Growth:** Over the last year, OBS reports that it has experienced 20% growth in UC sales including winning numerous new MNC customer contracts. The provider reports that it is also experiencing growth in the number of customers it has, with over 50,000 seats.

CURRENT PERSPECTIVE

Leader

Orange Business Services (OBS) 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. OBS also provides differentiation via faster capability turn-ups (it can switch on a country in two to five weeks), enhanced analytics capabilities (further bolstered by the acquisition of Business & Decision) and the leveraging of improved internal network monitoring and application management tools 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 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's Microsoft offering provides a hybrid solution combining Skype for Business and Office 365 (Skype for Business Online and Teams). 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. The provider has also launched a hosted BroadSoft solution for small enterprises in France and is considering launching the product globally.

Orange Business is responding to customers' demand to integrate their UCC systems with Google's office products using middleware such as Zang. 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 Webex Teams and Microsoft Teams. The provider is also using WebRTC for UC use cases. Other supported systems include X Medius, Mind CTI, IR Prognosis, Landis, PeterConnects and WorkStreamPeople; AudioCodes and Ribbon Communications for gateways, SBCs and survivability; Cisco Webex, Orange Cloud Connected Audio for Webex and PGI GlobalMeet for conferencing; Jive and SharePoint for file sharing; and Cisco, Polycom and Smart for video.

COMPETITIVE RECOMMENDATIONS

Provider

- **Social Media:** OBS should underline how it is integrating social media platforms such as Facebook and technologies such as WebRTC into its solutions.
- **Analytics:** Business and Decision gives OBS compelling access to analytics capabilities. OBS 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:** OBS 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:** OBS competitors should look at OBS 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 OBS.
- **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 global need should look to OBS 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 OBS 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 OBS.

METRICS

CLOUD/HOSTED SOLUTIONS

Rating	Leader
Service(s) Name	Business Together as a Service (B2GaaS), Business Together Cisco, Business Together Microsoft, Business Talk
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 and customer-specific data centres 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.
Platform	Business Together Microsoft and Business Together as a Service: 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.
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 and relies on Microsoft Enterprise Agreement or Office 365 plans.
MRC	MRC per user, per profile, per month based on the profile selected per user. Nine user profiles available for Business Together as a Service Cisco and seven for Business Together Microsoft.
Handsets Included	Endpoints sold directly to customer, leased or can be included in an OpEx model.
Contract Length	Three to seven years
Service Availability SLA	Platform service availability - 99.95%, with option of 99.99%
Voice Quality SLA	Voice Network Availability: 99.99% MOS: 4.1 Call Completion Ratio (CCR) = 99.8% Post Dial Delay (PDD) = 4 sec
Underlying Transport SLA	Packet delivery: ranges from 0.1% to 0.4% Jitter: 40 ms or less Latency: less than 100 ms worldwide
Other SLA	Available on supporting premises-based infrastructure such as voice gateways

MANAGED PREMISES-BASED SOLUTIONS

Rating	Very strong
Service(s) Name	Business Together supported by Business Talk (SIP trunking), PBX Management
Geographic Reach	<p>Business Talk: on-net 136 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, USA, Canada, Eastern Europe, Hong Kong, Singapore, under consideration for future deployment.</p> <p>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.</p> <p>Managed third-party PBX in 165 countries.</p>
Voice & UC Vendors Supported	Aastra, Alcatel-Lucent OmniPCX Enterprise, Avaya Communications Manager & Aura Session Manager, Cisco Unified Communications Manager & Unified Communications Manager Express, Unified Contact Centre Express, Microsoft Skype for Business Server 2015 (planning Server 2019) and new vendors integrated into certification programme, Unify OpenScape Voice (formerly Siemens) and Mitel Managed Premises-based Solutions.
Access Options	<p>SIP trunking: Access via MPLS, customers can also use symmetric DSL, and Orange Business will support access delivered via a third party.</p> <p>TDM: Switched and dedicated access; SIP trunking intra-company calling on-net 136 countries; international calling off-net 79 countries; domestic calling off-net 77 countries; local calling DID, dial tone 29 countries, 50 DID porting (only).</p> <p>Orange Business supports geographic redundancy options.</p>
NRC	<p>With break/fix & remote assistance operational services.</p> <p>Orange Managed: End-to-end service with equipment provisioning.</p> <p>Rental Model: End-to-end service including IPT core equipment (excludes IP phones).</p> <p>Resale Model: Customer owns equipment ordered directly or through a lease. Also assess, design, deployment, management.</p>
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	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 seven 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	Not available

UC SERVICES

Rating	Leader
Audio Conferencing	Audio and Web Conferencing for the MNC market, Audio et Web Conference for SMB Market. Audio conferencing cloud-based service can be made available based on PGI or on Cisco Cloud Connect Audio platforms. Audio and Web conferencing with PGI is delivered based on infrastructures located in the three main continents with presence in USA, UK, Netherlands, Germany, France, Singapore and Australia. Audio and Web conferencing Service with Cisco Webex Meeting relies on service platforms located in the US and in Europe.
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 suite, cloud-based or on-premises on-net video in 106 countries, Open Videopresence Premium cloud offer for all types of video equipment, Open Videopresence Management for customer dedicated infrastructure solution, managed by Orange. Orange Business Services is a Cisco Webex partner. Platform support: Cisco Polycom.
Geographic Regions of Bridging Exchanges	Open Videopresence Flexible Premium will have three exchanges located in France, the US and APAC by end 2018.

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 Cisco and Polycom, as well as support for additional bridging platforms.
Geographic Regions of Bridging Exchanges	Managed services can be deployed on customer infrastructure hosted in Orange data centres in Europe, US and APAC.
IM, E-mail and Desktop Integration	Cisco Jabber, Cisco Webex, Skype For Business online and server, Microsoft Exchange, Office 365, Microsoft Teams; Microsoft is integrated with leading telephony vendors, along with leveraging Direct Routing; 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 Webex, and Microsoft Skype For Business and Microsoft Teams.
IP Contact Center	<p>Services based on Avaya, Cisco and Genesys.</p> <p>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.</p> <p>Network-IVR: Interactive voice response.</p> <p>Flexible Contact Center: Hosted multichannel contact centre solution based on CosmoCom integrated with Business Together Microsoft.</p> <p>Managed Contact Center: Managed premises-based solution. Orange Business also supports contact centre features from the Business Together as a Service Cisco HCS platform using Cisco UCCX and Unity.</p>
Mobile Capabilities	Alcatel-Lucent Cellular Extension; Avaya Extension to Cellular; Cisco Mobile Remote Access (MRA), Webex & 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.

IPT AND UC SALES AND SERVICE DELIVERY

Rating

Very Strong

Sales Strategy

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, 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 165 countries.
Type of Partner Status Achieved	<p>Avaya: Platinum partner in Europe, Co-Delivery EMEA, APAC, UC Power Suite certified.</p> <p>Cisco: Global Gold partner; Global Resale Certified Partner, Master Collaboration, Global ATP Cisco Telepresence Video Master, Managed Services Master Certification worldwide; Global Master Cloud Managed Services Certified, Cisco Partner of the Year in 2017 for Europe Middle East region</p> <p>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.</p> <p>Polycom: Global Strategic Partner, Platinum Partner in France. Plantronics: Global Platinum Partner.</p>
UC Delivery Capabilities	<p>Design: 128+ experts provide presales consulting and complex solution design.</p> <p>Implementation: 1,300 trained and certified project managers/coordinators and 1,256 field engineers.</p> <p>Maintenance and management: 350 service managers worldwide for ongoing support and management.</p>

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.

GlobalData PLC, John Carpenter House, 7 Carmelite Street, London, EC4Y 0AN,
+44 (0) 207 936 6400