



Orange Business Services - Data Center and Cloud Services

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Larsen DeCarlo, Amy

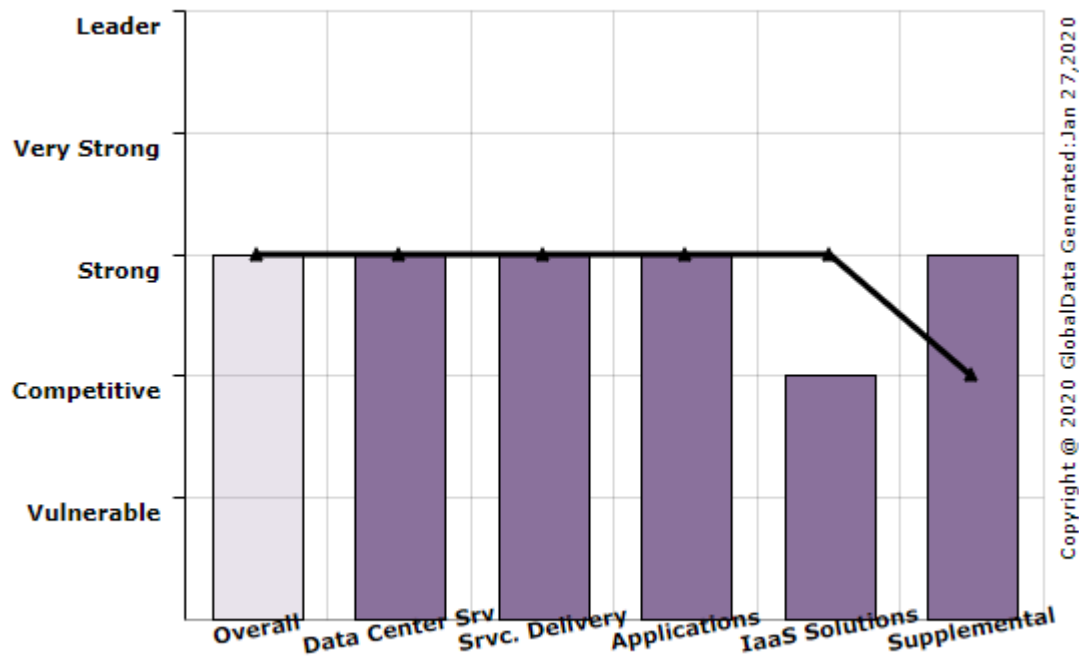
PRODUCT ASSESSMENT REPORT - DATA CENTER AND CLOUD SERVICES

REPORT SUMMARY

Orange continues to expand its multi-cloud capabilities through development and acquisition. The provider emphasizes its work to establish trust with clients as a differentiator.



Product Ratings



October 2019: Orange Business Services has developed solutions to enable maritime connectivity that offers secure, private cloud and IoT services to facilitate vessel management.

September 2019: Midea selected Orange Business Services as its global cloud service provider covering Asia, Europe, North America, and South America.

Product Name	Flexible IT
Description	The Flexible IT portfolio includes cloud computing (infrastructure as a service) and other hosted IT services (including software as a service) offered on flexible consumption models depending on customer need.
Components	<ul style="list-style-type: none"> • Flexible Engine • Flexible Computing Premium • Flexible Computing Private • Flexible Computing Advanced • Flexible Computing Healthcare • Cloudwatt • Business Together as a Service
Key Customers	<ul style="list-style-type: none"> • Amcor • BMW • Borgward Group • European Space Agency • Haier • JTI • Lane Crawford • Siemens
Key Rivals	<ul style="list-style-type: none"> • Amazon Web Services • BT • COLT • Google • IBM • DXC Technology • Microsoft • OVH • Rackspace • T-Systems • Vodafone

Strengths

- **Flexible Range:** Well-branded Flexible IT and Flexible Computing services offer a range of public, hybrid, and private IaaS/PaaS offers across multiple cloud management environments including AWS, Azure, Google, VMware, and OpenStack.
- **Cloud Connectivity:** OBS was ahead of the market with innovative cloud connectivity solutions, using networking know-how to enhance access to applications in the cloud. Most recently, it added Visibility-as-a-Service based on Riverbed's SteelCentral Aternity technology for SD-WAN and cloud migrations.
- **Service Focus:** OBS has invested heavily in professional and managed services across cloud operations, legacy systems migration, application management, and consulting (from design to security). This supports messaging focusing on 'managed multi-cloud' and 'best of cloud' solutions.

Limitations

- **Regional Limits:** Cloud service infrastructure is highly concentrated in Europe and Singapore; although there are now a number of availability zones globally for private cloud hosting, Orange can't offer in-region data storage as widely as some competitors.
- **People Power:** the same issue could challenge its cloud managed and professional services' ability to scale. The investment in people and skills is undeniable (Orange's Talent Management program delivered 45,000 hours of training annually, but they are more geographically concentrated than the footprint of Orange's global customer base.
- **Public Cloud:** Orange made a new commitment to public cloud two years ago with Huawei's OpenStack solution, but with its new focus on multi-cloud it is unlikely to build further on that investment. It has strong support for other public clouds, but that is not a differentiator.

Strong

Orange Business Services is strong in the data center and cloud services market, because it has the scale and portfolio depth, using public, private, and hybrid cloud models, to support business requirements ranging from pay-per-use, on-demand computing aimed at SMEs to complex hosting engagements for large multinational clients. The company's cloud strategy is increasingly varied and open, with a VMware-based platform in global data centers, OpenStack-based solutions in France, Netherlands, US, and globally through a partnership with Huawei, and managed hybrid and multi-cloud services in support of AWS, Azure, GCP, and other platforms.

Orange sees cloud as an ecosystem play, with the need to engage start-ups as well as large global players like AWS, Google, and Microsoft. Its 2018 acquisition of Basefarm brought thousands of SME and large enterprise hosting, ecommerce, and managed cloud and data center services customers, and is now helping Orange take on a multi-cloud world where the value is not necessarily in IaaS but in services that integrate and orchestrate resources from the wider ecosystem.

As such, Orange is positioning itself in the cloud as a key managed and professional services provider, offering solutions through the provisioning of end-to-end connectivity and multi-cloud orchestration. Among the assets acquired from Basefarm is its multi-cloud automation, orchestration, and management platform, which Orange found to be superior to both its previous management platform and other third-party tools. The integrated, AI-powered platform provides customers with an API-based management portal supporting end-to-end monitoring for both network and IT resources. Another asset: more than 500 managed cloud services professionals.

All of the company's cloud-related activities are consolidated in a standalone business unit, Orange Cloud for Business. This brings relevant assets and people together, concentrating its focus and enabling it to move quickly in portfolio updates while increasing its depth in service level engagement. The strategic vision the company has developed is based on flexibility (relieving customers of intense CapEx demands and lengthy contracting terms), hybrid infrastructure (providing both choice and integration with other services/resources), and support for bimodal IT.

So many service provider peers also see orchestration and integration of the cloud ecosystem as their USP, limiting differentiation, so Orange has heightened its focus on customer experience. Leveraging Orange's existing strengths in customer service, the provider can highlight metrics around application performance and operational efficiency in support of service level agreements (SLAs) defined by agreed business outcomes and customizable based on priority. It also has a compelling multi-source services integration offer which can be applied to and combined with cloud deployments.

The customer-centered approach is driven top down from a broad strategy which is to enable enterprise digital transformation driven by customer needs for digital solutions inside and outside the business. As such, its cloud portfolio is directly linked with adjacent solutions in big data and analytics (Datavenue), network (SD-WAN), security, and the Internet of Things, making it key to current and future investment.

Most recently, Orange has also been positioning cloud as a foundational element of its larger Data Journey framework, with cloud serving as the data factory in support of IoT, real-time data applications, new deployments of automation and AI. As a business, organic cloud revenue climbed 21% in 2019 (compared to 17% in 2018). Including the revenues of the Basefarm business acquired in Q3 2018, year over year growth was 55%.

Provider

- **Hybrid IT Integration:** OBS should continue to position the Flexible IT portfolio as a solution for hybrid IT, continuing recent efforts to elevate its messaging around multi-cloud service orchestration and the improved solutions made possible with Basefarm's platforms and people on board.
- **Customer Experience:** A strong reputation for enterprise customer satisfaction combined with a customer experience-centric strategy can win over prospects if proof points applicable to hybrid cloud can be established.

Competitors

- **Geographic Coverage:** Various competitors can offer cloud data center locations in many more jurisdictions to win customers that have especially strict data sovereignty compliance issues.
- **Network Focused:** Competitors with a stronger SaaS/PaaS story can position OBS as concentrated on network-related applications and services.

Buyers

- **Digital Transformation:** OBS is well positioned to augment private cloud services with globally distributed public cloud services, supporting application migration and the switching of legacy systems to the cloud.
- **Integrated Portfolio:** OBS should be considered as an end-to-end provider; its portfolio brings depth in public, private, and hybrid cloud services across multiple technology platforms.
- **France Leadership:** Strength in local cloud data centers, networks, and security resources makes OBS a potential top choice for enterprises with a France-centric (and potentially EU-centric) footprint.

Metrics

Rating:	Strong
Dedicated Managed/ Hosting Services:	Traditional hosted, colocated, on-premises managed data center and cloud services from 70+ data centers globally. Flexible Computing multi-tenant shared IaaS platform supports customers from simple hosting for SMEs in France to custom large-scale outsourcing for enterprises, all with services managed through a universal support process run from global service centers, underpinned by Orange Business Services' global network of 1,500 PoPs in 166 countries.
Colocation Services :	40 data centers globally offer colocation. Many of Orange Business Services 1,500 PoPs worldwide are also used for colocation.
On-Demand Compute Services and Storage Services:	<ul style="list-style-type: none"> On-demand Storage: Flexible Back-up as a Service is a fully managed solution based on EMC Avamar technology in Orange data centers, priced per GB of data saved. Flexible Storage, based on Cloudwatt infrastructure, provides file storage, as a sync and share solution for French businesses. Flexible Computing Express virtual data centers offer a pool of resources (CPU, RAM, disk, FWL, load-balancing), a self-provisioning portal, charged according to total resources used.-- Flexible Computing Premium is for larger/more complex application requirements/customers, offering automated virtual server environments (and optional dedicated servers) and a catalogue of IT infrastructures services with four management levels (managed OS, middleware monitoring, managed middleware, managed applications), charged according to usage. Flexible Computing Private offers integration of technologies and tools to deliver dedicated, secure, customized, flexible infrastructures, in Orange Business Services' or customers' data centers.
Disaster Recovery/ Business Continuity Services:	Shared cloud infrastructure (FCA) is duplicated in two data centers (failover), a customer is hosted in one data center and backup routed to another. A customer could also choose to deploy a DRP service to have his solution hosted globally or partially in the two data centers in active/passive mode (bespoke solution).
Rating:	Strong
Data Center Infrastructure:	Cloud and IT services are currently delivered from two data centers in Paris, Rueil, and Chevilly, plus a state-of-the-art facility in Normandy. Outside of France, cloud-ready data centers are established in Germany, Russia, Hong Kong, Singapore, Sydney, and the U.S., with partner locations and planned Orange locations in Poland, Brazil, Romania, and the UK. All of these data centers are Tier 3 or Tier 3+. In 2018, Orange gained 11 additional data centers in Europe through its acquisition of Basefarm.

Network Connectivity: All data centers are interconnected through Orange Business Services' own core backbone MPLS network which reaches 187 countries, 73 countries with Ethernet and 63 with DSL. Services can be accessed through the Internet or VPN. VPN access can also be provided via International Ethernet Link service, available in 34 countries for up to 1Gbps bandwidth interconnect.
The Enterprise Application Management (EAM) acceleration service based on Riverbed has been integrated into Business VPN Galerie to improve the user experience for cloud users at remote sites. The service boosts the performance of all major cloud services in Business VPN Galerie over enterprise customers' VPNs.

Redundancy Measures: Synchronous site mirroring between Rueil and Chevilly in Paris. Global support centers are situated in India, Cairo, Brazil, and France, for global coverage and resilience.

Site Security: All data centers are equipped with external cameras, perimeter fencing, 24-hour security, and badge reader or biometric entry control at both site and room level. All data centers are SAS70 compliant, and operational organizations are ISO9K / 20K compliant.

Rating: **Strong**

Commercial Hosted/Managed Enterprise Application Services: **Enterprise Resource Planning:** Managed SAP.
Customer Relationship Management: Contact center as a service; Virtual Contact Center Service using a shared platform hosted by Orange Business Services.
Collaboration: Managed Microsoft Exchange, SharePoint; Microsoft Online services (including messaging, IM, shared workspaces, and web conferencing).
Fully managed onsite and hosted security solutions, backed by security consultancy.
Private Application Store: a catalogue of applications (collaboration and other applications) hosted in Orange Business Services' or customer data centers.

On-Demand/SaaS solution availability: **On-demand and SaaS available for enterprise services, for example:**
Flexible Workspace: Microsoft e-mail and productivity applications available via thin-client on a monthly per seat basis.

Business VPN Galerie: an option of the company's Business VPN managed network offer for access to selected cloud computing services (from Orange or partners) delivered via VPNs.

Security as a Service: Messaging Protection Suite, Web Protection Suite, with choices of service management levels and SLAs, pay per use model, validation workflow and reporting. Flexible Workspace: SaaS.

Flexible Contact Center: SaaS with portal to allocate one of the 5 profiles to end-users.

On-Demand Collaboration Applications: **Collaboration:** Managed Microsoft Exchange, SharePoint; 'Office Together' Microsoft Online services (including messaging, IM, shared workspaces and web conferencing). Business Together as a Service: unified communications and collaboration. "Pay as you go" pricing per user and profile, can scale up and down based on business needs. Available to international markets, hosted in global data centers. Cisco and Avaya IP telephony solutions are available on a private cloud basis.

Rating:	Competitive
Use Cases:	General use case and business applications: Development and test environments, web-facing applications, business applications where customers wish to self-manage the underlying infrastructure. Flexible Computing Premium is for larger/more complex application requirements/ customers, offering automated virtual server environments (and optional dedicated servers) and a catalogue of IT infrastructure services with four management levels, where customers wish to offload operations tasks to Orange and free up resources.
Server Configurations:	A complete catalogue of servers is offered for dedicated use. Flexible Computing Premium virtual servers are supported on HP Blade Servers. A range of dedicated servers can also be specified as part of Flexible Computing Private solutions including converged (Cisco, Dell, etc.) and hyperconverged solutions such as Nutanix.
Storage Options:	Flexible Back-up as a Service is a fully managed solution based on EMC Avamar technology in Orange data centers, priced per Gb of data saved.
Virtualization Technology:	Citrix, VMware, OpenStack
Database Options	Oracle, MySQL, MS SQL Server, PostgreSQL
Security/Compliance Controls:	All data centers are SAS70 compliant, and operational organizations are ISO9K / 20K compliant. Virtual private clouds have 6 security zones, and dedicated firewalling and physical server options.
Portal Features:	Portal with provisioning, monitoring, managing, administering, and billing features.
Provisioning/ Decommissioning Time:	N/A
APIs:	N/A
Pricing Model/ Minimum Contract Terms:	Flexible Computing: Monthly charges are based on the total processing power, storage, and network bandwidth resources used.
Rating :	Strong
Application Integration Services:	Partners with Accenture, Wipro, CGI, and others.
Data Center Strategy Services:	Orange Business Services provides structured services to help customers define how to rationalize, consolidate or modernize their data centers to support the customer business activity, including: C18data center strategy, cloud readiness assessment, data center network infrastructure audits, data center move and consolidation, infrastructure transformation and transition, storage optimization, application performance management solutions implementation.

Supplemental Cloud Migration Services:

Assess, design, implement, manage, and optimize consultancy and integration services to plan and support clients' projects. Cloud Coach services support ongoing need for advice from existing customers.

Key Ecosystem Partners:

Huawei, Microsoft, Citrix, NetApp, Cisco, VMware and Dell EMC, SITA, NTT Communications, HP, Accenture, IBM, Atos, Unisys, Azure, AWS, and GCP.