Edge Services Strategy Assessment: Orange – 1Q22

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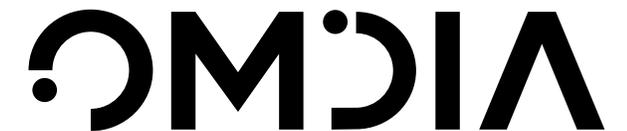
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Assessment overview and trends: Edge services

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Trends in edge computing and services – Global

- Digital transformation and increasingly data-driven application workloads across industries, combined with technology advancements and investments by service providers, are accelerating enterprises' adoption of edge solutions and related services.

- Current edge deployments are primarily driven by the need for data to be processed close to where it is generated, processed, and used, such as at local Internet of Things (IoT) environments. Future deployments, however, will feature greater integration with hybrid cloud, data center resources, and microsite edge solutions enabled by network functions virtualization (NFV).

- Third-party IT services providers are the main partners for edge-enabled cloud services. Telco investments in edge through 5G and networking expertise will redefine the market; however, edge remains an ecosystem play (also involving hyperscalers and integrators).

- Lack of in-house skills in enterprises, the perceived complexity of edge computing, and lack of understanding of ROI are holding back adoption. However, these inhibitors also provide opportunities for telcos and their partners for consulting and as-a-service models.

- Two-thirds of global enterprises surveyed by Omdia expect to have deployed edge computing by the end of 2022. The majority of these deployments are dedicated onsite servers (site edge), but the edge is also increasingly used as a gateway to cloud resources, according to Omdia's *Digital Enterprise Services Insights: Global Edge Service Trends 2021–22* report.

- Global enterprise edge services are expected to reach $97.5bn in 2022 and $213.0bn in 2026 (CAGR for 2022–26: 21.7%).

- Service quality and support, security and compliance controls, and technology innovation are the most important criteria for enterprises choosing an IT services partner.

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About Omdia's edge services assessments

- **Purpose of assessment**
  - Catalog providers' transformative edge services, supporting offers, and go-to-market (GTM) strategy.
  - Evaluate providers' edge capabilities and issue high level competitive recommendations.

- **Services assessed**
  - Edge integration, network, compute, storage, and security services.
  - Managed edge services and their supporting platforms.
  - Professional services capabilities related to edge strategy and deployment.

- **Inclusion criteria**
  - Global telecommunications provider with own fixed and mobile networks.
  - Tier 1 provider capable of supporting global, large enterprise and governments business operations in multiple regions.
  - Global revenue of over $200m across multiple regions.

- **Omdia rating**
  - Each provider is scored out of 5 (maximum), reflecting Omdia's assessment across five equally weighted dimensions: market clout, breadth, depth (of managed and professional services), and partner ecosystem.

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Orange's edge services portfolio

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Why Orange is important to enterprises in edge services

- **Significant scale**

  – Communications and IT services provider with over €40bn annual revenue globally (largest telco deal sizes in Europe).

  – Derives approximately €7.2bn of total revenue from multinational, domestic large enterprise, and small and medium-sized enterprise (SME) services.

  – Significant services share and multiyear contracts, including network, communications, cloud, data center, and IoT deployments.

  – Strong growth across non-network business areas, geographic regions, and verticals (e.g., 15%+ in global cloud services in 2021).

  – Global network infrastructure featuring 18,000km of fiber optics and 450,000km of submarine cables, as well as 3,000 satellite antennas.

  – Over 3,000 dedicated consulting professionals (across a range of related technologies and industries).

- **Solid capabilities and partnerships**

  – Network-native digital services company with the ability to support customers globally with depth and width of edge computing.

  – Availability of Orange services within 5ms latency of customer sites in 80% of its global locations.

  – Edge-enabled digital innovation supported by Orange's innovation lab and co-innovation partner ecosystem.

  – Network, cloud, artificial intelligence (AI), and security expertise to support any edge services as holistic concepts for business and vertical use cases.

  – Willingness to co-create individually tailored solutions with key customers and partners.

  – Systems integration capabilities, including edge network infrastructure deployment as a driver for additional services.

  – Diverse partner ecosystem featuring deep SAP and Microsoft relationships and capabilities with certification and training.

  – Strong relationships with hyperscalers, namely Google Cloud Platform (GCP), AWS, and Azure. Training & certification program to reach over 7,000 by 2025.

  – Professional services capabilities bolstered through acquisitions of BLEU, Login Consultants, Business & Decisions, and Baseform.

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Orange: Edge network, security, & infrastructure services (1/2)

- **Orange offers individually tailored network and infrastructure integration focused services at the edge in combination with other technologies.**

Portfolio service	Description	Comments
Network edge computing with 5G	• Implement and integrate network infrastructure to enable services (e.g., business applications and data processing/storage) at the edge • Uses 4G/5G networks, CDN servers, and/or the Orange NextGen Hub depending on enterprises' workloads and individual requirements	• Provides a natural extension of Orange's own network infrastructure to the edge, as well as for private 5G networks • Partly driven by 5G rollouts; however, 4G or CDN servers can also be used for most scenarios in countries with the Orange network • Orange can add various services on top; e.g., workload management and cybersecurity at the edge
Fog edge computing (FEC)	• Build industry-specific solutions based on FEC, such as for remote surgery with VR, Industry 4.0 with IoT, and financial services applications • Also applicable as an edge solution for home workers deployed in tandem with SD-WAN by integrating edge into local network devices	• Focus is on local ultra-fast data processing for achieving consistent network performance and lower latency from any location (e.g., home, office, branch) • Orange can utilize its expertise across network, IoT, AI, data science, and cybersecurity to offer holistic solutions in combination with consulting and professional services

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Orange: Edge network, security, & infrastructure services (2/2)

- **Orange offers IoT, 5G, and cloud computing services that increasingly feature edge components.**

Portfolio service	Description	Comments
Customer edge computing with IoT	• Build, operate, and manage dedicated edge infrastructure at enterprises' sites, including manufacturing plants, retail branches, and data centers • Provides SD-WAN and 4G/5G connectivity with edge IT, IoT, and AI-based services on top	• Focus is on local processing for achieving consistent network performance and lower latency from any location (e.g., home, office, branch) • Orange can utilize its expertise across network, IoT, and cybersecurity technology and offers holistic solutions in combination with consulting and professional services
Public & private cloud with edge extensions	• Public cloud platform with various integrated features (e.g., bare metal, storage, databases) • Dedicated cloud and infrastructure within Orange's data centers and at customers' premises • Flexible platform as a service (PaaS) application platforms for app development and delivery in the cloud	• Services include Flexible Engine and Bleu • Provides linkages to hyperscalers • Multicloud solutions • Focus on in-country data processing for compliance and trust • Application architecture consulting • Designing, building, and operating private cloud environments

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Orange: Edge managed services

- **Orange offers a range of value-added services that are increasingly moving to the edge.**

Portfolio service	Description	Comments
Centralized cloud computing management at the edge	• Managed hyperscaler and multicloud environments that extend to the edge • Using edge as a gateway to hyperscalers' cloud resources with workload management, orchestration, and security solutions on top as a fully managed service	• Key selling points are maximizing the benefits and reducing complexity of multicloud environments to avoid vendor lock-in combined with expert support by certified engineers (e.g., on AWS, Azure, GCP) • Orange positions itself as a trusted provider that can offer better cost management, greater agility, and compliance with data protection (e.g., GDPR) vs. hyperscalers' own enterprise edge solutions
Management of big data platforms and Hadoop distributions	• 360° customer view based on data science and analysis (with Basefarm) • Support regarding innovative approaches to data and AI-driven solutions; e.g., computer vision, video surveillance, and chatbots	• Data and AI-based workloads are increasingly moving to the edge; hence, there are plenty of opportunities for expansion for Orange • Implementation and support services are complemented with big data and Hadoop-based managed services provided by Orange Business Services as well as Basefarm, a company acquired by Orange in 2018
Digital workspace management	• Virtual and remote desktop services provided in multicloud mode with data processing at the edge	• Orange already manages various large enterprises' and public sector organizations' workspace environments and can bring these to the edge for greater network efficiency and compliance

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Orange: Edge professional services – Consulting and advisory

- **Orange provides business and technology consulting to help enterprises establish business cases and implement edge solutions.**

Portfolio service	Description	Comments
Business consulting	• Helping enterprises understand the risks and opportunities of edge computing • Strategic advice and planning for co-innovation and ROI feasibility • Proof of concept, pilot projects, scalability, and change management considerations	• Orange has capabilities to help enterprise decision makers to create business cases for edge computing and any related services • Industry expertise across key sectors and the ability to provide local consultants in the countries that Orange operates in is a differentiator
Technical advisory and integration consulting	• Assessment of internal systems, network infrastructure, and IT assets to determine if and how edge computing could be deployed • Design technical proofs of concept (PoCs) • Systems integration, implementation, and service maintenance	• Enterprises' digital transformation initiatives provide Orange with opportunities to offer technical consulting and integration services, usually after defining the business case and running PoC • Orange relies heavily on its partner ecosystem for technical expertise across various areas, including network and communication, cloud, cybersecurity, IoT, and business applications
Technical support and training	• Orange provides experts for customer sites to deal with any technical issues and fluctuating data volumes at the edge • Training for enterprise IT staff and users regarding management platforms and apps	• Offering support services post implementation and staff training form part of a strategy to stop customers from switching to other providers • Orange has opportunities to extend the support services that it already provides in other areas (e.g., cloud, network, security) to the edge

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Orange: Value-added services at the edge – Cybersecurity

- **Orange offers value-added services, including cybersecurity, that are increasingly moving to the edge.**

Portfolio service	Description	Comments
Cybersecurity at the edge	• Cyberdefense and threat detection, including network and cloud security • Security risk assessment, third-party auditing, and perimeter security	• Orange's various cybersecurity services can be extended to the edge for end-to-end security across the network, cloud, and on-premises edge infrastructure • Can also be combined with IoT and 5G to secure enterprises' environments
Threat detection & intelligence	• Managed cybersecurity service featuring Orange's proprietary threat intelligence data lake • Cyberdefense and monitoring extended to the edge, powered by AI/machine learning (ML) • Over 2,500 cyberdefense experts globally	• Cybersecurity is a key strength for Orange's network and cloud strategy and is crucial for extending these services to the edge • Collaboration with ecosystem partners, including Europol, technology vendors, and cloud services providers is key—see also Orange's partnership with Google Cloud

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Orange: 5G edge services – Google Cloud partnership

- **Alliance with Google Cloud focuses on a range of analytics, AI, and security services.**

Portfolio service	Description	Comments
5G edge services partnership with Google Cloud	• Collaboration with the hyperscaler to develop edge services as 5G networks are rolled out across various countries (mainly in France and Benelux) • Aims to bring cloud computing capabilities to the edge of the network • Features Google AI and ML as key technologies for analytics at the edge • Cybersecurity combined with analytics capabilities as a managed service • Joint setup of an Innovation Lab and Center of Excellence	• Strategic partnership to support infrastructure transformation and the development of edge computing solutions for cloud services • Enterprises mainly benefit from cloud computing capabilities being brought to the edge for data analytics and ML platforms • Orange to build new analytics and ML platforms based on Google tech • Google to train several thousand Orange employees • Retail and gaming are key target markets among other industries • Orange's commitment to using Google AI also drives the provider's internal transformation

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Orange: Edge network transformation – Dell partnership

- **Orange utilizes Dell's expertise in IT infrastructure, software, AI, and cloud to achieve edge network transformation.**

Portfolio service	Description	Comments
Multi-access edge computing (MEC) partnership with Dell	• Joint initiative for accelerating edge network transformation • Gradually moving telco cloud focus from the core to the edge • Joint development of distributed cloud architectures to deliver real-time edge use cases • AI/ML-enabled software development for workload management automation • New platform development for supporting edge- and 5G-based services • Universal customer premise equipment (uCPE) solution also featuring middleware provider Ekinops	• Dell as a key provider of compute and storage leverages its expertise in building clouds by extending it to the far edge as a gateway to broader cloud resources in partnership with Orange • Orange also benefits from Dell's expertise in mobility, infrastructure solutions, software capabilities, and virtualization (VMware) • Focus is to some extent on edge solutions for 5G-enabled industrial IoT workloads • Partnership helps Orange to enable the right use cases for edge while Dell works on similar telco cloud initiatives with telcos of all sizes globally • Orange requires technical expertise from major IT solutions vendors such as Dell and could also benefit from joint GTM opportunities

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Orange's go-to-market strategy

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Orange: Go-to-market and differentiators (1/2)

- **Edge included across cloud, security, data intelligence, and IoT solutions**
  - Increasing focus on promoting edge capabilities when showcasing these solutions.
  - However, edge is not a separate category and tends to be offered based on enterprises' business needs.
  - Partly driven by bespoke solutions and co-innovation with clients and partners.

- **Business consulting and technology advisory focus**
  - Increasingly leveraging expanded consulting capabilities (both organic and acquisitions) to touch new and existing customers.
  - Ability to engage through entire cloud lifecycle of customer, from strategy and application modernization to managed services.
  - Center of excellence (e.g., SAP, big data, AI) to drive transformational business outcomes with customers.
  - Co-creation strategy with customers becoming more widespread with large enterprises.

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Orange: Go-to-market and differentiators (2/2)

- **Expanding partner ecosystem, including major information and communications technology (ICT) vendors and hyperscalers**
  - MEC partnership with Dell for accelerating edge network transformation and AI/ML-enabled software development.
  - 5G edge services partnership with Google Cloud and collaboration with AWS and Azure with ability to offer multicloud at the edge.
  - Joint GTM and solutioning as a one-stop-shop for enterprises for their network, cloud, and IoT related needs.

- **Growth driven by global multinationals, European-focused manufacturers, and the public sector**
  - Orange is keen to expand globally beyond its stronghold of France and neighboring countries, and it has secured major deals with US-headquartered multinational corporations (MNCs) that operate across multiple countries globally.
  - SMEs and government agencies are also targeted by Orange's salesforce, with its greatest presence in Europe, supported by the addition of headcount through recent acquisitions as well as ecosystem partners with local presence.

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Orange's ratings — Edge services

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Orange ratings – Edge services

Summary	
Operating model	• European-based global telecoms, network, and cloud services provider
Customer base	• Domestic SME, national, and international enterprises
Global reach	• 3,000+ dedicated consulting professionals covering key industries • Extensive network reach globally • 70+ data centers across five continents • Global partner ecosystem featuring major hyperscalers
Key differentiators	• Deep integration capabilities and track record • Edge-enabled innovation supported by co-creation with partners • Managed services extending to the edge (e.g., security, workspace) • Strong consulting capabilities and credentials • Own network with 5ms latency at majority of global customer sites • AI and analytics skills complement cloud and infrastructure expertise

Competence	Rating
Overall leadership score	**3.9**
Market clout	① ② ③ ④ ⑤ (4)
Edge network, security, & infrastructure services	① ② ③ ④ ⑤ (4)
Edge managed services	① ② ③.5 ④ ⑤ (3.5)
Edge professional services	① ② ③ ④ ⑤ (4)
GTM & partner ecosystem	① ② ③ ④ ⑤ (4)

Ratings summary

❶ Falls short of industry expectations

❷ Meets basic industry and customer requirements

❸ Meets complex industry requirements and customer expectations

❹ Demonstrates advanced capability

❺ Demonstrates market leadership

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List of Orange's major IT services contracts

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Orange: IT services public contracts, 2020–21

Client name	Announcement date	Contract length (m)	Total value of contract ($m)
Belgian Federal Public Service of Foreign Affairs	December 7, 2020	120	115.0
AkzoNobel	April 7, 2020	60	100.0
Schneider Electric	June 29, 2021	36	50.0
Amcor Ltd.	March 15, 2021	36	40.0
RS Components	April 13, 2021	36	32.0
KONE	February 24, 2021	36	25.5
CNES	October 19, 2021	36	24.0
BNP Paribas	January 13, 2021	39	21.8
Government of Egypt	February 9, 2021	60	21.0
McConnell Dowell	July 9, 2020	48	15.4
GÉANT	March 23, 2021	50	13.8
Raspadskaya	April 28, 2021	36	13.5
ZIM Integrated Shipping	July 1, 2020	36	10.5
Brunel	May 6, 2021	45	10.0
Glovo	July 7, 2021	36	9.5

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Orange: IT services – Further major deals in 2020

- Total value of 100 major deals disclosed by Orange Business Services in 2020: $3.0bn

- Deal values range from $8m to $377m

- Average deal term: 47 months

- Average number of countries covered by deal: 37

- 15 global MNC deals signed in the US, including the largest deal by total contract value (TCV)

- Manufacturing sector provided largest TCV, followed by professional services, public sector, and retail

- Network services provided largest share with a strong focus on workspace & collaboration

- Other notable services featured infrastructure, cloud, application services, and cybersecurity

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Summary and recommendations

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Industry recommendations: Orange – Edge services

Recommendations for	Area	Recommendation
Orange in edge	Focus on solutions for resolving key business challenges	• Orange is on the right path to shift its business model from the focus on individual products and business units to a more holistic business outcome-based approach. The provider could further align its business model to offer truly end-to-end solutions with edge as an important part alongside other technologies and tailored to enterprises' business challenges, including operational efficiency and improved customer experience.
	Promote innovative capabilities of edge solutions	• Orange already features various blogs that discuss the benefits of edge computing. However, all edge-related services are currently part of cloud, network, IoT, and other areas. By creating a new edge category to combine these services in addition to links to the other technologies, Orange could differentiate itself further and showcase its edge capabilities in a clearer and more convincing way.
	Expand edge consulting capabilities	• Continuously expanding its technical expertise around edge combined with business and local knowledge is important, as competition is heating up, and projects featuring edge services tend to be consulting-driven. • Orange needs to find the right balance between co-creating individual solutions with clients and offering more standardized edge solutions for specific applications and workloads that provide higher margins.
	AI and analytics	• Orange could further develop its AI and data analytics capabilities, which are already a key differentiator, and could apply AI/ML to a wider range of workloads and platforms that utilize edge computing.
	Industry solutions	• Orange should explore pushing out industry-specific edge solutions in partnership with ICT solutions providers, hyperscalers, and specialist local consultancies. Key verticals include manufacturing, financial services, retail, and government.
	Networks & security	• Orange's expertise and heritage in telecoms, network technology, and cybersecurity could be integrated into any innovative edge solutions and promoted accordingly to differentiate further from systems integrators and hyperscalers.

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Industry recommendations: Enterprises

Recommendations for	Area	Recommendation
Global MNCs	Business case / strategic guidance	• Orange has major strengths in consulting and professional services and is willing to co-create individual solutions for clients. It can act as a one-stop-shop and can design end-to-end solutions with the business case in mind, touching on the edge as part of the wider network, cloud, and infrastructure strategy.
	Edge services & technical requirements	• Orange has both in-house experts in edge technology and partners that bring in extensive technical capabilities, ranging from hyperscalers and ICT solutions vendors to data center and network providers. • Certifications for independent software vendor (ISV) and hyperscaler applications, platforms, and technologies provide further expertise.
	Trusted partnerships	• Orange positions itself as a provider of choice based on trust, offering not only a reliable network but also independent multicloud environments without vendor lock-ins and with data protection and compliance in mind. • Orange's wide-ranging global partner ecosystem supports its own capabilities in this context.
European organizations	Industry & local use cases	• European enterprises and government agencies tend to value Orange as a regional leader with global presence and edge capabilities supported by its own large-scale network infrastructure, data centers, cloud services, and local consultants with industry knowledge across many European countries.
	Opportunities for growth	• Orange can guide enterprises, including SMEs, as they grow and scale up to adopt edge solutions step by step. • Opportunities for co-creation of individual edge solutions that could be monetized further through resale.

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Rating scale for the edge

Ratings

❶ Capabilities fall short of basic industry expectations

❷ Meets basic industry and customer requirements, but lacks advanced options and/or a differentiating position

❸ Meets sophisticated customers' and industry expectations, both in fundamental capabilities and detailed features and options

❹ Demonstrates comprehensive capabilities, backed by an exceptional range of options and/or specialization

❺ Demonstrates market leadership that others in the industry must align with or compete against

Competencies and criteria

Market clout	Edge services revenue and revenue growth; company's activities influencing competitors, customers, and prospects; and market reach by industry/vertical and geography. Importance as strategic IT services provider for key clients, major IT services deals, and use cases featuring edge.
Edge network, security, & infrastructure services	Edge solutions and expertise across network, security, compute, storage, and infrastructure assets, and investments to expand and improve reach, performance, and resilience; range of portfolio features and options.
Edge managed services	Availability and depth of managed services, including managed MEC, data services at the edge; service deployment flexibility and ability to customize offers; and ease of use and integration of workload and infrastructure monitoring/management as a service.
Edge professional services	Diverse range and capabilities regarding professional services, including consulting, technical, and strategic advisory for edge deployments; ability to offer custom solutions based on customers' individual needs; and willingness/ability to co-create and innovate.
GTM & partner ecosystem	Customer acquisition strategy, including marketing/sales segmentation by customer size, vertical, and need; tight quote-to-cash delivery processes; customer service and support resources; and strong direct sales and/or channel partner interest. Large partner ecosystem and meaningful strategic alliances with key players, including hyperscalers, systems integrators, and IT solutions vendors.

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Definitions for the edge

- Enterprise cloud services assessments use qualitative ratings based on the analyst's understanding of the subject company's service capabilities, influence, and effectiveness relative to an industry average among leading peers. The ratings and averages are based on public information and on the analyst's knowledge of the industry and its players.

Rating context	Explanation
Geography	This report covers enterprise edge services, including network, IT, and professional services on a global scale across several markets served by the leading telcos. Key regions include North America, Europe, and Asia & Oceania.
Customers	The report skews toward telcos acting as network and IT services providers that serve a range of customer sizes, verticals, and needs effectively. It does recognize large-scale services contracts while also taking into account when providers are targeted and successful at serving a narrower audience.
Portfolio ratings	The edge services ratings emphasize solutions and expertise across network, security, and infrastructure as well as managed edge and professional services. These ratings skew toward innovation, differentiation, holistic and customized solutions, and any perceived service gaps.
Market ratings	Market clout, GTM, and partner ecosystem ratings represent a broad scope of the provider's strength and effectiveness in edge and related services. The market clout rating takes into account measures related to the provider's overall size and influence. The GTM rating takes into account measures related to effectiveness in sales, marketing, onboarding, and managing the customer experience.
Adjunct factors	The report also covers systems and data integration capabilities at the edge, as well as implementation and related software development. Neither of these factors has its own rating, but each has an indirect influence over ratings (e.g., market clout, edge infrastructure, professional services).

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Appendix

Further reading

Edge Services Forecast – 2022–26 (coming soon)

Enterprise Cloud Services Assessment: Orange – 1Q22 (February 2022)

Market Landscape: Systems Integrator Enterprise IT Services at the Edge – 2022 (January 2022)

2022 Trends to Watch: 5G, Internet of Things & Edge Services (November 2021)

Digital Enterprise Services Insights: Global Edge Service Trends 2021–22 (October 2021)

Service Provider Spotlight: Orange Business Services continue to push the envelope in the IT integrator space to deliver growth (August 2021)

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