

Orange Business - Collaboration and Customer Contact (Global)

June 23, 2023



Gary Barton

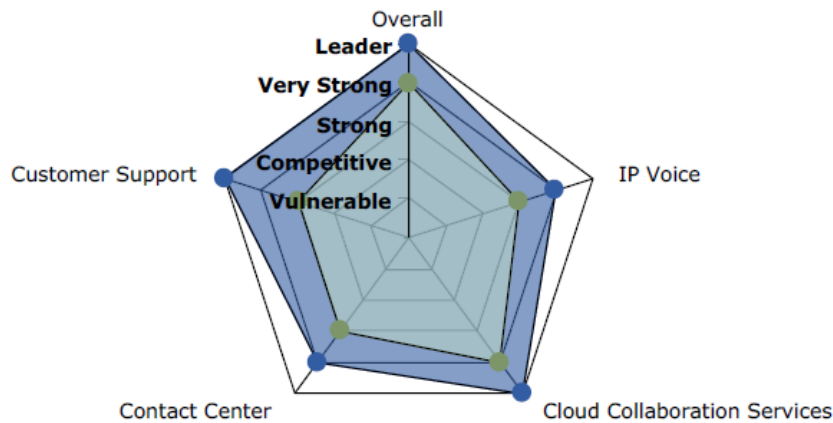
PRODUCT ASSESSMENT REPORT - GLOBAL COLLABORATION AND COMMUNICATIONS

REPORT SUMMARY:

Orange’s collaboration and customer contact portfolio provides a comprehensive range of collaboration and customer contact capabilities backed by a compelling set of professional and managed service support with expansive global presence.

SUMMARY

Product Ratings



- Orange Business - Collaboration and Customer Contact (Global)
- Product Class Average

Copyright © 2023 GlobalData Generated: Jun 23, 2023

WHAT'S NEW

March 2023: Orange Business (Orange) won a renewed and expanded contract with AB InBev to deliver connectivity and voice services. Orange Business supports AB InBev across its European operations, providing critical connectivity between 70 locations and its headquarters in Belgium. In addition, Orange Business is transforming the legacy voice services to SIP-based solutions and is delivering a Microsoft Teams environment.

PRODUCT OVERVIEW

Product Name	Business Together
Description	A suite of cloud hosted and on-premises voice, unified communications, collaboration, and contact center solutions, primarily based on Microsoft and Cisco, with an accompanying network of ecosystem partners.
Components	<ul style="list-style-type: none"> • Audio and web conferencing • Business Talk • Business Together Cisco • Business Together with Microsoft, including Direct Routing & Operator Connect • Business Together with Zoom • Business VPN Galerie • Managed Microsoft Teams Rooms (MTR) • Open Videopresence • Workplace Together Webex includes Cisco Webex Calling and Cisco Webex Contact Center, delivered by Orange
Key Customers	<ul style="list-style-type: none"> • Amcor • Mondelez • Heineken • Japan Tobacco International
Key Rivals	<ul style="list-style-type: none"> • Accenture • AT&T • BT • DXC Technology • IBM Global Services • T-Systems • Tata Communications • Telefónica Business Solutions • Verizon Enterprise Solutions • Vodafone Global Enterprise

ESSENTIAL ANALYSIS

Strengths

- **Global Presence:** Orange offers hosted Business Together, based on Microsoft Office 365 and Teams Direct Routing (80+ countries) and/or Cisco Webex (93 countries). Business Talk session initiation protocol (SIP) trunking reaches 143 countries and territories for on-network calling, reaches 88 countries and territories for off-network calling, and provides local voice services with direct inward dialing (DID) assignment in 46 countries and territories.
- **Customer Experience:** Orange's first-class customer support is delivered by 21,316 staff in 166 countries (including 7,700 in customer services and operations, with 3,400 experts offering 24x7 support across five global customer service centers). Orange also offers compelling pre-sales consultative support.
- **CPaaS and Automation:** Orange is establishing itself as a provider of CPaaS and API-based solutions. Using its Orange Labs R&D capabilities and an ecosystem of partners, Orange has worked to create bespoke communications platforms for customers, including mass communication solutions and chatbots. It has also invested in application programming interfaces (APIs) and the ability to embed communications within apps. Orange is also focusing on process automation and states that it has already automated more than 600 common processes, adding an attractive business efficiency message to its collaboration suite.
- **UC Growth:** Orange continues to report strong growth in its collaboration and contact center sales. Direct Routing for Microsoft Teams has been one of Orange's fastest growing services, as well as a source of new logo wins. Meanwhile, Orange is also experiencing strong demand for customer contact solutions.

Limitations

- **OTT Erosion:** Orange has acknowledged that OTTs represent a particular threat to its unified communication (UC) revenues.
- **Vendor Choice:** Orange is one of the few major providers not to offer a solution based on RingCentral. Although RingCentral does not have the market share of Microsoft or Cisco, it has established itself as a strong alternative, and Orange is limiting its options by not partnering with the vendor.

CURRENT PERSPECTIVE

LEADER

Orange is a market leader in the global collaboration and customer contact markets for multinational corporations (MNCs) because the provider combines a compelling range of services and vendor platforms with a compelling and nuanced approach to sell collaboration services. Orange provides differentiation, via enhanced analytics capabilities as well as the leveraging of improved internal network monitoring and application management tools (e.g., visibility-as-a-service), to create better user experiences. The company has also expanded its CPaaS and process automation 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 as well as shepherd the firm through the transition to a simplified global ICT infrastructure. Orange has rightly identified that enterprises are in a state of flux with their future of work strategies. Solutions designed for pandemic lockdowns were implemented in haste and usually not designed for a mobile and hybrid workforce. Orange is therefore engaging with customers to help them identify their needs when it comes to collaboration and workplace solutions as well as to deploy solutions that can flex as organizations and workplace practices change. Orange is keen to highlight that its consultancy services remain provider and vendor-neutral and that its recommendations are based on the understanding of which may be the company asked to realize them. The company reported 60% growth in its consulting services revenues in this area during 2022.

Orange continues to operate a multi-vendor collaboration portfolio with solutions based on Microsoft Teams, Cisco Webex, and Zoom. Orange has traditionally favored Cisco solutions, but it now states that Microsoft is its most popular service and has come close to being the default choice in the MNC space. However, Orange is seeing increased demand for Cisco solutions, in part based on the strength of Cisco's device portfolio. Since 2022, The two companies have strengthened their partnership as can be seen by the launch of Orange's Cisco collaboration boost proposition.

Orange's workplace/workforce portfolio includes virtual desktop and unified endpoint management (UEM) capabilities. On the desktop and UEM side, Orange's partners include Microsoft, Citrix, Ivanti, and VMware. The provider manages more than 100,000 virtual desktops and more than 1.5 million UEM licenses. Its desktop proposition seeks to offer a combination of slim-client and cloud-hosted features backed by a range of micro-VPN and zero trust technologies.

On the contact center side, Orange is working with Genesys and Nice, and Cisco Webex. Genesys has been its most used partner historically, but it is seeing a growth in demand for the Webex customer contact solution. Orange's primary focus is on cloud-hosted solutions, and it states that 75% of its customer contact revenues stem from cloud solutions, and this percentage is increasing. It offers a wide range of services (e.g., voice, video, chat, AI, virtual agents, agent support, etc.) on an à la carte basis alongside its strong integrations and consultancy capabilities. Orange states that it has 3,400 service desk experts, 50+ customer journey/CX consultants, and more than 700 software engineers supporting its portfolio.

COMPETITIVE RECOMMENDATIONS

Provider

- **Future of Work:** Orange can highlight that it has a wide-ranging 'future of work' portfolio, which combines collaboration, customer contact, and desktop as-a-service components alongside compelling managed integration services marketed under the banner of 'Workplace Together.'
- **Analytics:** Business & Decision gives Orange compelling access to analytics capabilities. Orange is already using these for pre-sales, but it should consider how analytics can be used to improve UC adoption and to prove return on investment on UC deployments.
- **APIs:** Orange 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:** Competitors should look at Orange as a strong example of how collaboration services should be sold as a business solution rather than a technology.
- **Support Services:** When competing against Orange, rival providers should ensure they lead with strong professional services and end-user support (e.g., user training) messages.
- **OTTs:** The opportunity is there for providers to engage more with disruptors (e.g., Facebook, Google, and Amazon Web Services) 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 and complex global needs should look to Orange 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 Orange offers consultancy services to non-network customers.

METRICS

IP Voice

Rating:	Very Strong
Platform(s):	Business Talk and Contact Center Access , on-premises or cloud-based (regional peering links established with major vendor platforms from Microsoft, Cisco, Zoom, Genesys, and Nice enable seamless service transition to the cloud).
Geographic Reach:	SIP trunking (Business Talk): 143 countries and territories Inbound services (Contact center access): Toll-free numbers offered in 127 countries and territories, toll numbers in 116.
SIP Trunking Availability:	<ul style="list-style-type: none"> • Business Talk: • On-Net: 143 countries and territories • Off-Net International: 88 countries and territories • Off-Net Domestic: 46 countries and territories • Local Voice Services (LVS) direct inward dialing: 46 countries and territories • LVS full unplug: 35 countries and territories

PSTN Breakout Availability:	LVS direct inward dialing: 46 countries and territories LVS full unplug: 35 countries and territories
Supported Direct Connect Services:	Direct Routing for Teams, Microsoft Operator Connect
Access Options/ Redundancy:	Managed networks (MPLS, SD-WAN) or internet
Pricing Structure:	Per channel, per DID range, per minute
Features:	Business Talk provides a global, seamless voice service with the ability to manage all types of calls: outbound, inbound, on-net, off-net and local at national and international levels. Customers benefit from a full digital journey, accessible via portal or API (e.g., ordering, change management, incident management, billing, reporting, call detail record exchange, etc.) with many features available in self-care mode.
Security/Encryption:	Customer sites are IP connected through Orange hosted and managed session border controllers that provide security and an application server that provides trunking services such as call admission control. Sites connected via Ethernet access to Orange private IP network benefit from MPLS security features while sites connected via internet access must use TLS1.2 and specific cipher suites designated by Orange to provide security. Specific country designs for countries with strong regulatory/compliance constraints (e.g., Brazil, China, Russia, India).
Contract Length:	12-60 months
SLAs:	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 Packet delivery: ranges from 0.1% to 0.4% Jitter: 40 ms or less Latency: less than 100 ms worldwide
Handset Options:	Poly, Cisco, Audiocodes

Cloud Collaboration Services

Rating:	Leader
UC Platforms:	Cisco Webex Suite, Microsoft Teams/365, Zoom Meeting/Phone
Geographic Reach:	165 countries with exceptions for certain platforms based on regulatory compliance
Video/ Web/Audio Conferencing Platforms:	Cisco Webex, Microsoft Teams, Zoom
Online Events Broadcasting Platform:	Kollective
Team Collaboration Platforms:	Cisco Webex, Microsoft Teams
Mobile Support:	Yes
Pricing Structure:	NRC and MRC or full MRC based on the amortization of NRC's
Contract Legth:	Minimum contract periods are typically three years for a committed user count, anything above the commitment can flex up or down without penalty
CPaaS:	CpaaS use cases delivered through Vonage coupled with SMS Brokerage delivered directly by Orange. In addition, CpaaS is also provided via Microsoft ACS and Webex Connect
APIs:	Yes, leveraged through Orange Digital and Data where Orange has a productized fixed fee App development offer

Contact Center

Rating:	Very Strong
On-Premises Platform(s):	Cisco, Avaya, Genesys, Nice Genesys, Anywhere 365 for very small Contact Centre
Cloud Platform(s):	Cisco, Nice, Avaya
Inbound/ Outbound Voice Availability:	Based on contact center access
AI:	Optional services provided by Orange developed on partner's technology stacks or internal development

Omnichannel/ Multichannel Support?:	Yes
Chatbot Support?:	Yes, via partners

Customer Support

Rating:	Leader
Sales Strategy:	Orange leans on its extensive pre-sales and consultative resources to enhance the sales process
User Training/ User Adoption Services:	Orange offers a full range of user training and adoption services on a modular basis
User Portal:	Top level portal in Orange is “My Service space,” which provides visibility to the underlying solutions delivered to the customer; this typically includes performance reports, case volumes/history and relevant information to the solution deployed. In addition, Orange also includes relevant 3rd party management; for example, Microsoft Direct Routing and Operator Connect are managed through the same portal and interface. Specifically for users, Orange offers a portal relevant to the technology chosen that would allow self help and feature management for the device/collaboration platform deployed. In the case of Microsoft, this is an internally developed portal. For Cisco and Zoom, these are the vendor or 3rd party interfaces (e.g., Kurmi). Worthy of note is that we also provide user experience monitoring in Microsoft environments via Martello DX.
Professional Services:	50 presales solution specialists and architects and 100 billable consultants in major countries provide consulting, assessment, design, project management, field engineering for deployment, and break/fix in 165 countries. Log-In Consultants - 330 specialists for Virtualization, cloud, and the modern digital IT-workspace.
Type of Partner Status Achieved:	Avaya: Platinum partner in Europe, Co-Delivery EMEA, APAC, UC Power Suite certified. Cisco: Global Gold partner; Global Resale Certified Partner, Master Collaboration, Managed Services Master Certification worldwide; Global Master Cloud Managed Services Certified, Global Enterprise Partner worldwide. Microsoft: Solutions Partner for Digital and App Innovation; Security, Data and AI, Infrastructure, Modern Work. Poly: Global Strategic Partner, Platinum Partner in France.
Consultancy:	Design: 128+ experts provide presales consulting and complex solution design. Implementation: 1,300 trained and certified project managers/coordinators and 1,256 field engineers. Maintenance and management: 350 service managers worldwide for ongoing support and management.
Integration Support:	Yes