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Orange Mobile Enterprise

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PRODUCT ASSESSMENT REPORT - GLOBAL ENTERPRISE MOBILITY SERVICES

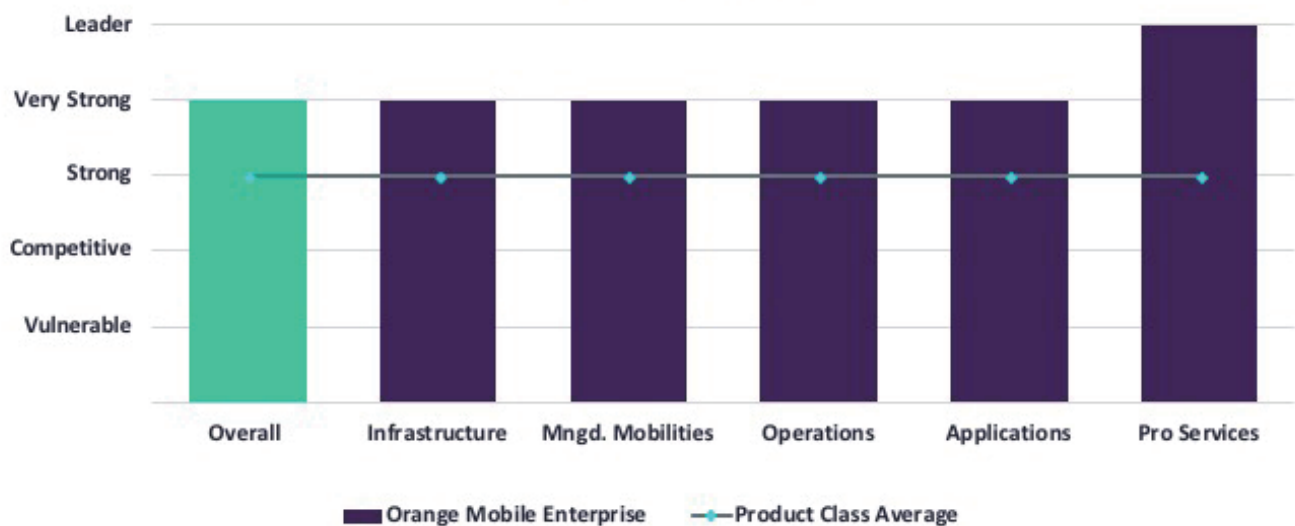
REPORT SUMMARY

Orange Business Services is expanding the breadth and global availability of its enterprise mobility offerings with new service management and security and a growing mobile footprint via expanded FreeMove and Bridge Alliance partnerships.

SUMMARY



Product Ratings



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WHAT'S NEW

- **February 2018** - Revealed expanded footprint for MNC mobile connectivity engagements through the FreeMove partnership with 17 new operators in the Bridge Alliance in Asia-Pac, for a total of 106 operators. Orange global account management and service management is, however, operator agnostic.
- **February 2018** - Enhancements made to EMM professional services and security portfolio include: GDPR compliance; mobile IT integration; Windows 10 device management (desktop and mobile); secure cloud access; and mobile malware and threat prevention, in particular, through Orange Cyberdefense (based on Check Point).
- **February 2018** - Disclosed operator-agnostic multi-sourcing service integration (MSI) strategy to offload customers' mobility management functions including service and contract management, dispute, incidents and requests management, process automation, integration, and mobile security.

PRODUCT OVERVIEW

Product Name	Orange Mobile Enterprise
Description	Orange has strong experience in serving complex multinational customers and offers tailored and comprehensive managed mobility services with optimized connectivity, value-added services for security, cost and process management, and industrialized service management. Orange Mobile Enterprise offers a set of products and services that span customer relationship management, identity and data protection, mobility and workspace management, mobility solutions, and smart machines and objects. More than most, OBS has specialized in creating highly tailored mobile workspace solutions for its MNC client base as well as developing an operator-agnostic multi-sourcing service integration (MSI) strategy for MNCs to outsource part of or all of their mobility management.
Components	<ul style="list-style-type: none"> • Connectivity - LTE access to 30 European countries and cellular access to 106 countries and territories through FreeMove and Bridge Alliance, as well as over 64 million WiFi hotspots in more than 160 countries/territories and in-flight services on over 20 airlines through iPass. • Process and cost management - works with Datanet, Samsung, Wandera, and Tangoe to automate processes for device staging, telecom expense management, mobile costs optimization, and real-time control. • Mobile device/app/content security and management - provides EMM solutions through best-of-breed platform providers and secure mobile gateways, with mobile threat detection, secure cloud access, UEM, and consulting offers. Provides corporate app stores and content mobilization. Managed solution (backend and professional services) based on MobileIron.

- Mobility service management and professional services - provides 24x7 support in French and English through a dedicated mobility team, with project management, implementation management, customer service management, global service desk, customized processes, and reporting.
- Multi-sourcing Service Integration (MSI) - tailor-made proposition to offload customers' mobility management functions including service and contract management; dispute, incidents, and requests management; process automation; integration; and mobile security.

Key Customers

- Solvay
- Euromaster
- Amcor
- Nestlé
- Belgian Federal Public Service of Foreign Affairs

Key Rivals

- Accenture
- AT&T
- BT
- DXC
- Google
- IBM Global Services
- Telefónica Business Solutions - Multinational
- T-Systems
- Verizon Enterprise Solutions
- Vodafone Global Enterprise

ESSENTIAL ANALYSIS

Strengths

- Orange has strong experience providing solutions to complex multinational customers. It offers comprehensive managed mobility services and industrialized service management. New multi-sourcing service integration adds transparency into governance processes.
- Orange offers a customized mobile connectivity solution, Optimized Mobility Management. With continuous analysis of end users' traffic, Orange recommends the best bundles for those users, not limited to the Orange footprint.
- Orange offers mobility alongside unified communications/collaboration, IT management, cloud services, and security, which are all related elements of its offerings for the digital workspace and mobile IT.

Limitations

- While Orange has a vertical approach in IoT and offers some vertical B2B apps in accounting, audit, commerce, etc., it has not set up a formal vertically oriented organizational or product structure to add focus to its mobility offer.
- Vodafone remains a strong competitor, with its heritage as a mobile-first provider, and still gains customers that want widespread mobile connectivity from a single supplier.

CURRENT PERSPECTIVE

Very Strong

Orange Business Services is very strong in global managed mobility services, with comprehensive offerings from consulting to end-of-life device management, to a clearly targeted market of MNCs; this allows it to provide standardized solutions with optional customization to drive success in a competitive but innovation-light market.

Orange Mobile Enterprise (OME), the entity within Orange Business Services that focuses on MNC mobility and IoT, targets 600 global accounts that need central governance and have significant growth potential. It attracts them with tailored, optimized connectivity, process and cost management, EMM and enhanced security (via Orange Cyberdefense unit), application and content management, staging, and logistics. It has a flexible end-to-end service process to manage these activities across more than 106 countries, including its connectivity partners, FreeMove and Bridge Alliance.

OME has dedicated resources for mobility in Europe and Mauritius with 24x7 support and links to the Orange Business Services CSO organization for a unified service, with customized solutions including integration with customer processes. Mobility service management includes dedicated implementation project management to coordinate multi-domestic deployments, while a global reporting system displays domestic usage and spend from a central dashboard. Through the global service desk, customers can log incidents, ensuring that all domestic and international operations are controlled through a single point of contact. Service managers can also propose fully customized operational procedures and reporting based on customers' requirements.

Orange offers public, hybrid, and private cloud delivery models and on-premises EMM platforms. EMM includes MDM, MAM, MCM, secure container, secure cloud access, desktop and mobile management, UEM, and an enterprise app store through MobileIron. Samsung Knox is an option for staging and enhanced device encryption. Apple DEP is supported for MacOS and iOS. Orange has integrated UC and mobility so that customers can push the UC client onto mobile devices and access the service with single sign-on.

In 2018, OME is focusing on multi-sourcing service integration, including packaged and a la carte services for mobile service management, budget control, dispute management, process automation, mobile security, TEM/contract management, optimization, incident management, and IT service integration.

Orange offers enterprise mobility alongside peer services such as fixed voice, UC, security, and mobile application development, both independently (responding to 'pure' EMS RFPs) and as part of a wider plan to optimize the customer's use of IT and network resources.

COMPETITIVE RECOMMENDATIONS

Provider

- **Steady as She Goes:** Orange should continue to focus on adding value while preserving margins through integration, customization, and service delivery, as this is the right approach to win business in a largely commoditized market.
- **Stretch the Competition:** Orange needs to speed up its adoption and implementation of emerging technologies such as blockchain, wearables, AI/ML, and AR/VR in its mobility and IoT customization offers, further differentiating it from competitors.
- **Exploit Flexible Engine:** Orange should point out that its new Flexible Engine public cloud platform - now covering France, Europe, and Southeast Asia, with MEA to come in 2018 - is being used to host its EMM solutions.

Competitors

- **Specialize:** Orange has impressive on-net reach, but is dependent on partners in APAC and the Americas, so competitors such as Deutsche Telekom should stress their geographically differentiated offers and play up their improving SD-WAN capability and internetwork connectivity.
- **Adopt a Position:** Competitors like BT can continue to focus on coverage and product integration to simplify offers and cut costs, leaving grandiose but risky development projects to others.
- **Play the Ecosystem Card:** Competitors can match Orange's in-house application development and integration strengths using an ecosystem of third parties.

METRICS

ENTERPRISE MOBILITY SERVICES INFRASTRUCTURE

Rating	Very strong
Strategic Relationships/ Platform Partners	FreeMove/Bridge Alliance, MobileIron (MDM, MAM, MCM, unified endpoint management, secure cloud access, mobile threat detection), Datanet (telecom expense management and central ordering), Tangoe (TEM), Samsung (staging), Apple, Cisco (Spark), Microsoft (Lync UCC)
Network Footprint	Fixed: 118 countries; Mobile: 106 countries (30 with 4G/ LTE access) including FreeMove and Bridge Alliance; WiFi (iPass): 160 countries with 64 million hotspots. Satellite: Global VSAT coverage, including oceans.
Global Availability	Has developed a CSP-agnostic service management platform that has expanded Orange's ability to add CSP partners beyond FreeMove/Bridge. Is also building its capability to manage a fully-outsourced EMS service for customers.

MANAGED MOBILITY SERVICES

Rating	Very strong
Mobile Device Management	Managed solution based on MobileIron and hosted on Orange cloud. Recent enhancements to EMM professional services and security portfolio include GDPR compliance, mobile IT integration, Windows 10 device management (desktop and mobile), and secure cloud access.
Mobile Application Management	MobileIron. Supports iOS, Android devices, and now Windows 10.
Security Management	Provides VPNs and security controls as well as managed authentication, encryption and SSL services. Secure cloud access through MobileIron. New mobile identification and prevention service through Orange Cyberdefense, using Check Point platform.
TEMS/Logistics Management	Bases service on Datanet, Tangoe, Samsung, Wandera.

Other (e.g., device virtualization, performance management)

Connectivity optimization - Value Orange, Cisco Apple (VOCA) provides E2E support for Wi-Fi deployment, Cisco Spark integration and Apple iPad and iPhone configuration and management, with network optimization.

Context-aware availability - OBS is researching a 'personal bot' that allows users to discriminate between callers and respond appropriately via SMS when the user is 'unavailable.'

Customization - Increasing request for tailored services have led to investment in pre-sales, consulting and professional services management.

OPERATIONS

Rating	Very strong
Device Lifecycle Management	Provides comprehensive lifecycle management for mobile devices, including OS strategy. Mobile fleet management covers e-catalogue, device ordering, tracking & inventory, delivery, testing, DOA management, staging, repacking, tagging, on-site support, and service management. Integration with customer's ITSM tools to automate and harmonize processes (Remedy, ServiceNow, MDSL, Citrix, etc.)
Tiered Service Packages	Three (standard, advanced, premium)
Client Care/HelpDesk Services	OME has a dedicated mobility team that provides 24x7 support in French and English. This is in addition to the OBS support team which offers 24x7 service in 30 languages in 160 countries. ISO 9001, 20000, and 27001-certified service desk, trained in project management systems, e.g., ITIL, SixSigma, PMP, Prince2.

MOBILE APPLICATIONS

Rating	Very strong
Custom Development Tools	N/A
Custom Development Services	Can design, deliver, and manage custom-built end-to-end mobile device and expense management, application development, and desktop virtualization services.
Mobile Security Apps	Aside from MobileIron core platform, also offers AirWatch, but can provide any MDM platform the customer wants. Orange has added real-time Malware and Threat Protection (MTP) to its portfolio, giving it the ability to close down instantly devices detected to be infected or misbehaving. Managed EMM offer supported by 350 security specialists; new support for GDPR.
Top Packaged Applications	UCC

Other (e.g.,
Workplace as a
Service, Mobile
Messaging)

Customizable Connection Kit client automatically chooses best available access method, including dial-up, with optional SSL connections.

PROFESSIONAL SERVICES

Rating	Leader
Business Consulting	OBS has increased its capacity to analyze and address business-related issues, including fixed-mobile convergence, application development and support, E2E device management, process simplification, and mobile security. Provides proactive alerts on GDPR, for example, and plans to address it.
Technical Consulting	Experts in cloud, UCC, business applications, integration. Device rationalization, OS strategy, BYOD.
Systems Integration	OBS acts as supplier and/or integrator, depending on client needs. Provides full integration of the EMM solution with Microsoft, Google, Cisco, Pulse Secure, Check Point, ServiceNow, Salesforce, Splunk, etc.
Admin/End-User Portals	Provides mobility service management hub, with fully customized processes (end-user portal) and reporting (reports are pushed to the customer by e-mail or SMS).

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