

Orange Wholesale International

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What's New

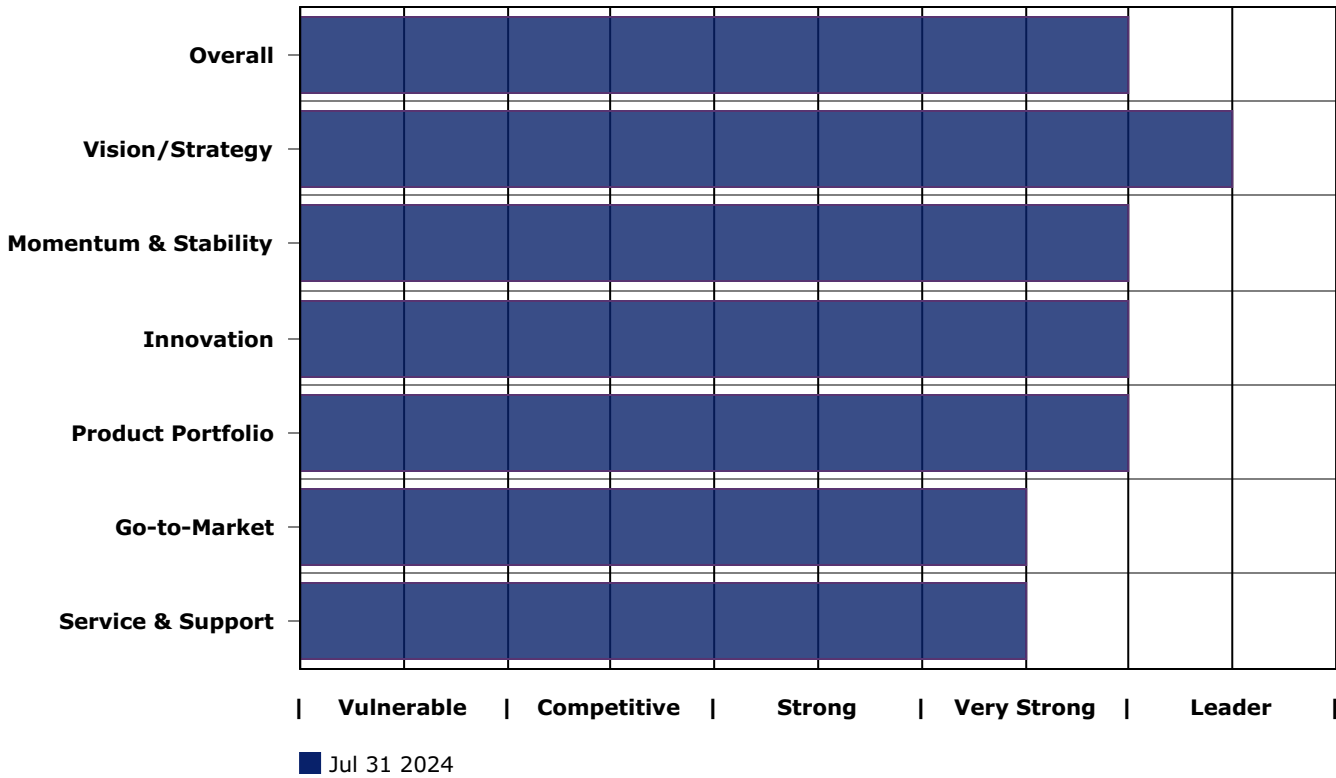
- May 2024: Orange and Nokia have expanded their partnership to focus on advancing network programmability and monetization using Nokia’s Network as Code platform. This partnership will accelerate Orange’s 5G network capabilities to create applications for customers in Europe.
- April 2024: Orange announced that the Southeast Asia-Middle East-Western Europe 6 (SMW6) cable system has landed in Marseille, France. The 21,700km cable links France to Singapore, and work will begin to deliver a 3,000km cable system to Egypt.
- April 2024: Orange will add Augtera Network’s AI platform to its NOC tools to leverage AI/ML in daily network operations. It’s expected the deployment will be fully rolled out by end of 2024, covering all of Orange’s Global Network.
- March 2024: Orange partnered with Infinera for collaboration on Orange’s international backbone network. Orange has selected Infinera’s GX Series compact modular networking platform to provide high-capacity connectivity. This will enable Orange to deliver optimal services across its network footprint in line with changing bandwidth requirements.

GlobalData Competitive Index



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Rating Update Summary

Very Strong

Orange Wholesale is leveraging the significant investment it has made in its network assets as Orange looks to focus on

building on the core while expanding into new emerging areas including 5G, Network as-a-Service, and satellite.

Perspective – Essential Analysis

Strengths

- **Well-Established Player:** Orange Wholesale is a leader in the international telecommunication services segment that offers a broad range of solutions delivered by strong network footprint.
- **Strong Product Line:** The carrier has a comprehensive range of mobile wholesale products, including IPX, SS7, SMS A2P, 4G, and 5G. Transition to VoLTE is supported for both interconnection and roaming over Multiservice IP eXchange. Orange Wholesale is an experienced player in the delivery of global data and bandwidth services, supported by network investments on land, undersea, in the air and in space, thanks to 5,000 satellite antennas and 25 ground stations.
- **Content Delivery Network (CDN):** Orange Wholesale has a strong and secure CDN offering with extended coverage of 200 CDN PoPs worldwide through its partnership with GCore.

Limitations

- **Powerful Rivals:** Orange Wholesale is threatened by the presence of powerful rivals with unique strengths in certain geographies (i.e., Telefónica in its home location and UK through the acquisition of Cancom UK&I, and NTT Communications in Asia).
- **Incumbent Siloed Approach to Wholesale:** There has been a number of developments in promoting interworking with B2B to create differentiation. But Orange Wholesale is still siloed in its approach and needs to capitalize on wider capabilities that sit outside the business unit.
- **Voice and Messaging Revenue:** Like most service providers, Orange is experiencing a decline in voice and messaging minutes to customers looking opting for low-cost OTT options like WhatsApp.

Category Ratings and Justification

Vision/Strategy

Rating : Leader

- Orange Wholesale's strategic plan centers around four pillars: optimizing voice and messaging by creating additional value, capitalizing on existing infrastructure assets, maximize its services portfolio, and launch new digitalized products through API to offer a wholesale as a platform solution. Orange Wholesale will also focus on cost optimization while creating more value for the customer by adding anti-fraud solutions to portfolio of services.
- Orange Wholesale continues to focus on CDN and expanding its connectivity footprint including in Africa. Orange will continue its presence in subsea cables which covers over 40 submarine cable globally covering 450,000km. It is also aiming to increase its presence in Dark Fiber to meet the growing demand from customers. Orange is also set to further embrace growth technologies including Satellite to mobile calling solutions and other 5G SA products.

Momentum & Stability

Rating : Very Strong

- In 2023, Orange Group reported revenue growth of 1.5% year on year closing the year at EUR44.1 billion. Orange Wholesale reported revenues EUR7.3 billion in 2023.
- Orange has rebranded its Wholesale division from Orange International Carrier to Orange Wholesale International as the company focuses on adapting to the changing telecommunications market. Orange Wholesale continues to invest and transform their network while looking to commercialize new as-a-service solutions to market.
- Orange Wholesale has enhanced the capacity of its IPX network to accommodate the growth of data roaming and better roaming experience for different types of traffic including VoIP, 3G/4G/5G data, SS7 and LTE signaling, and 5G NSA and SA networks. Orange's IPX footprint now spans 200+ countries through 270+ PoPs. In addition, Orange Wholesale has partnered with E& to upgrade their Middle

- Building on from the Wholesale Evolution program, Orange Wholesale will look to digitalize some of their products by developing APIs to offer on demand as-a-service wholesale solutions. In addition, Orange will look to create a marketplace to offer services to its customers.

Innovation

Rating : Very Strong

- Orange Wholesale is working to deliver Wholesale-as-a-Service and Network-as-a-Service (NaaS) offerings as part of the Orange Group's wider vision. Orange has introduced APIs for sales that support feasibility, pricing and ordering, and 'service ticketing' which supports trouble tickets and order status functions. Orange API also supports its partners with additional products including EVPL.
- Orange Wholesale benefits from over 5,000 satellite dishes and 25 ground stations including its Bercenay based teleport. In addition to its GEO and MEO orbital fleets, Orange Wholesale has a new distribution partnership with OneWeb and its constellation of 630 LEO satellites. Orange has also integrated areas of its wholesale and B2B network platforms/cores, i.e. the Open Global Network works across both B2B and wholesale.
- Orange Wholesale is a leader in anti-fraud and security, boosted by Orange Cyberdefense's 2,500 experts and backed up by a dedicated 24/7 fraud protection team. Orange Wholesale offers a comprehensive portfolio of solutions around two pillars: detection and protection against fraud and cyber risks. Orange is also working to enhance its security features including enhanced spoofing detections, 100% anti-smishing, and IRSD proofing for 962 destinations.

Go-to-Market

Rating : Very Strong

- Orange Wholesale is a leading Tier 1 carrier that provides end to end global wholesale connectivity to 1,300 customers. Orange has adapted from traditional providers to now include non-telco native providers as the company has diversified its portfolio and is supporting carriers with integrated portfolios.
- Orange Wholesale targets customers including operators,

East IPX network. The upgrade increases capacity 10 times while enabling a larger number of regional MNOs to access low latency routes.

- Orange Wholesale has unified five businesses to mobilize and develop its global network assets including Totem Orange's European Tower Company and Orange Marine. The latter is one of the world's largest fleets of cable ships with the ability to deploy, service, and recycle subsea infrastructure.

Product Portfolio

Rating : Very Strong

- Orange Wholesale has created customer-centric segmentation for its wholesale services: roaming, messaging, voice, bandwidth, IP and content distribution, security, anti-fraud, and cloud connectivity. Orange Wholesale has a large catalog of VAS, including voice anti-fraud solutions, DDoS protection, steering of roaming available in OTA mode, and troubleshooting for IPX and signaling services.
- Orange Wholesale's international voice solution provides global coverage to over 1,600 destinations to both fixed and mobile terminations via bilateral or direct routing. Orange offers other on-demand voice services such as hubbing and corridors.
- Orange Wholesale's bandwidth portfolio supports International Private Line (IPL) delivered through a dedicated Layer 1 solution with Ethernet Virtual Private Line (EVPL) solution delivered through a Layer 2 MEF 3.0 certified service that allows global coverage to data centers, internet exchange, and cloud providers. Using network automation Orange Wholesale can deliver EVPL circuits through its eCare self-service platform or API for instant quotation, feasibility, ordering, and delivery.

Service & Support

Rating : Very Strong

- The Orange Wholesale eCare customer portal includes 24/7 access online ordering, monitoring, reporting change management, and technical issues ticketing. The eCare portal allows customers to incorporate the Ethernet Online API directly into their systems, with authentication based on a state-of-the-art platform. The Looking Glass tool is now available to monitor IP transit performance.

hyperscalers, content providers and wholesalers, with six lines of solutions across three service levels: Essential, Dynamic, and Intense. In customer service, Orange has formalized improvements under four major areas: delivery, customer care, service management, and billing & cash management.

- Orange Wholesale has implemented a multi-channel distribution strategy: direct (customer facing sales), indirect (sales through an intermediary via Orange entities or external partners), and digital (online interaction only). It has increased its sales and support presence with offices in Latin America, Asia, and Africa, and is locally present in 30 locations .

- Orange Wholesale’s international division's sales team consists of more than 150 sales and presales operatives globally. The sales strategy is an end-to-end process, with marketing and sales aligned with key addressable markets, as well as enhanced tools, training, and incentives.

- Orange Wholesale Customer Service Center has a dedicated team supporting customer incidents. Customers are supported by service managers placed in all regions of operation and support centers in New Delhi and Paris that provide 24/7 support. Orange Wholesale’s ticket management system allows the company to provide a high first level completion rate of 85% of all mobile and voice-related tickets. Data solutions that require a technician are supported throughout the process by the support team.

- Customers are supported by a team of more than 1,500 experts in 28 countries, working 24/7, following the sun. This includes PMI-certified project managers for complex deals, operations experts, and service design teams for tailor-made operating models. Orange Wholesale sales is enlarging its offices footprint worldwide to be closer to its partners.

Segment Ratings

Market	Perspective
Wholesale	Very Strong
Fixed & Mobile Networks	Very Strong
Managed Services	Very Strong

Threats and Barriers

- **Powerful Rivals:** Orange Wholesale is threatened by the presence of powerful rivals with unique strengths in certain geographies (e.g., NTT Communications in Asia).
- **Cloudification and Automation:** While Orange Wholesale is making progress, rivals such as Telefonica and BT Wholesale are pushing ahead with cloudification and automation.
- **A Need to be Nimble:** Smaller wholesale operators such as Syniverse and iBasis have more nimble operations, which may help them to respond more quickly to unique customer requirements.

Sustainability

- **Environmental:** Orange Group is aiming to be net-zero carbon by 2040, with 50% of electricity from sustainable sources by 2025. The carrier has optimized energy and resource consumption by securing responsible energy supplies in eight European countries and investing in carbon sinks, in line with Orange’s plan to reduce its carbon emissions by as much as 90%. Intermediate targets include 30% CO2 emission reduction by 2025 and 45% by 2030. Orange since has reported that it hs reduced CO2 emissions from 2015 to 2023 (scope 1 & 2) by 37.4%.
- Orange is prioritizing reduction of fuel and oil consumption by settling partnerships with energy services companies and

by constructing solar farms in Africa and the Middle East (AME). Through its Green ITN 2025 program, Orange is targeting minimizing electricity usage in its networks and data centers. Orange launched a sustainability bond for EUR500 million to finance projects that reflect its ambitions in the green and social fields.

- **Social:** Orange focuses on diversity and inclusion for driving innovation, well-being, and performance. Gender equality has been central to its HR strategy for more than 15 years and is the subject of a dedicated internal governance. Orange opened a 'Hello Women' campus where women interested in careers in digital professions can access advice. All these initiatives helped Orange improve its gender-based representation to reach 21.9% and 34.1% in its technical and management teams respectively, Orange are on track to meet its 2025 goal of 25% and 35%.

- **Governance:** Orange promotes three layers to protect its customers' businesses: anti-corruption, inclusive AI, and responsible purchasing. Orange dedicated compliance teams play an integral role in a wider strategy to manage the risks of unethical behavior. Orange encourages its employees, contractors, suppliers, and partners to use its provided reporting platform 'Hello Ethics' to report any breach of conduct.

Recommended Actions

Vendor

- **Strong Roadmap:** Orange Wholesale can highlight its main priorities by providing a clear outlook to maximize current full-service offerings and deploying self-service capabilities through network automation. This could stand out to other providers in wholesale.

- **Network Credentials:** Orange Wholesale can emphasize its network credentials, including diversified cable routes and its expanding submarine capacity and highlight new entry into new emerging markets (e.g., satellite connectivity).

- **Data Analytics:** Orange Wholesale can further explore leveraging big data analytics to help prevent fraud and drive higher quality levels. Additional areas can be explored opening up usage data on traffic patterns within its network to give partners new commercial opportunities, such as targeted campaigns.

Competitors

- **Network Penetration:** TI Sparkle and Telefónica can emphasize their network penetration in Latin America and UK, while in the US and Latin America AT&T, Verizon, Zayo, and Windstream can do the same. Windstream should point to deep network penetration in the US, while Arelion can point to its strong presence in the Nordic and Baltic states.

- **Stronger Foothold:** Verizon and Tata Communications can underscore efforts to build a stronger foothold in AME. Tata Communications can point to its investments in the region and participation in submarine cables such as SEACOM and WACS.

- **Global Network:** Verizon Partner Solutions can point to its global network spanning a million route-miles as well as its strong presence in the US.

Buyers

- **Good Reputation:** Orange Wholesale has a positive reputation, a strong global network presence, and good levels of product expertise.

- **Global Coverage:** Orange Wholesale has a good global footprint, with specific regional strengths in parts of AME and Europe, but other carriers might offer compelling service in regions such as the Americas and the Nordics.

- **Compelling Product Line:** The carrier's close affiliation with Orange has led to compelling and innovative products. Orange Wholesale International is able to deliver competitive prices and technically strong solutions.

Company Details

Company Snapshot

Revenue	Orange Wholesale reported revenues of EUR7.3 billion in 2023
Employees	Group 2023 figure: 137,000; Orange Wholesale 3,300
HQ	Paris (France)
Market strengths/solutions	<p>Voice: including Voice hubbing , Serenity Voice, Voice Corridor IDD; call collect numbers</p> <p>Messaging: P2P SMS, MMS, A2P SMS</p> <p>Roaming: IPX, SS7, LTE and VAS; 5G Roaming; Roaming Hub, Roaming Sponsor, Big Data</p> <p>Bandwidth: Dark fiber, International Private Line (IPL), Ethernet Virtual Private Line (EVPL),</p> <p>IP: IP Transit, DDoS Protection, Data Professional Services</p> <p>Content Distribution: CDN</p> <p>Space Networks: Ground Segment hosting, Mobile backhauling</p> <p>The carrier's Marseille (France) hub is the digital gateway of its IP connectivity in Europe.</p>

Network Description

Fixed/Wireline Network	Transmission PoPs in major cities in Europe, North America, Africa, and Asia, dedicated IP infrastructure, with more than 220+ ISPs/carriers connected in 100+ countries, complementary satellite capacity and participation in 450,000km of submarine cables. Interconnections allow direct connections to 350 operators in 220 countries and a total of 1,600+ destinations worldwide for fixed or mobile voice.
Mobile/Wireless Network	For mobile roaming services, Orange has SS7 connectivity to 1,000 mobile networks in 220 countries and territories. Orange offers access to 4G services across 600 destinations and are constantly expanding LTE signaling connectivity. Orange has now launched 5G in eight European countries: Belgium, Botswana, France, Luxembourg, Poland, Romania, Spain, and Slovakia, and is set to launch a full range of 5G SA solutions in 2024.
Data Centers	Orange has approximately two dozen data centers but have

access to more facilities through third-party colocation providers to meet customer requirements.