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InfoCom presents the global Managed UC market from the providers' perspective.

Global managed UC market very fragmented — Local incumbents generally strongest players — US largest players relevant mainly in their domestic market — Country-wise, many local players.

Stuttgart, Germany — The market for managed Unified Communications (UC) services is still fairly fragmented, with many so-called local champions. This results from a recent InfoCom study that analysed the position of providers and vendors for managed UC globally.

Managed UC players can be classified, first of all, as either carriers or non-carriers. Amongst carriers, the incumbents hold the strongest market position as alternative operators mainly focus on networking solutions. Non-carriers can, in turn, be classified in three sub-groups: direct sale arms of UC vendors (as Avaya or Siemens direct sales), ICT service providers/outsourcers (as Atos, HP, IBM or Wipro) and system houses that come either from voice/telephony (as Damovo or NextiraOne) or desktop services (as Computacenter).

In most countries, the local incumbent is indeed the strongest managed UC provider, thanks to a long historical presence in the PBX area, often linked to the most established vendors; as well as to the technical ability to provide networking services (E1, xDSL, Ethernet, VPNs etc.) in addition to all services around UC.
The main players, globally, are positioned as follows: Dimension Data, BT GS, Verizon, AT&T and OBS as well as Avaya and Siemens direct sales. Siemens' ranking considers only Siemens direct sales although, in some countries as in France, Siemens sells actually indirectly. AT&T, Verizon and OBS are not very strong with managed UC outside their home markets, except for some key, domestic-based, multinational customers. As a consequence, managed UC is actually provided mainly for existing large multinational customers and when managed UC is part of a larger contract including network services. Part or most of large projects may be sub-contracted to UC specialists present locally, for instance Accenture, Atos, HP, IBM and

Wipro (and some other large IT services providers), which are often indirectly involved as part of large IT outsourcing projects.

On a country perspective, in addition to the incumbents, there are often several local players. Some of these are present at global scale, although most of them are only active in their domestic markets. Telindus, for instance, is present in Belgium, France and the Netherlands; Axians, Spie Communications and Inéo are all three active in France; Italtel is active in Italy; Imtech, in the Netherlands. It is very interesting to see that the UK is more competitive and fragmented than other markets, with several players competing against each other: Computacenter, Logicalis, NSC Global, 2E2, ONI and Voyager, just to name a few.
In the US, the main players are indeed AT&T, Verizon, Dimension Data, CenturyLink and Avaya while other players — such as Siemens direct sales, HP, IBM and BT GS — play a much minor role.

From a vendor's perspective, there is no doubt that Cisco is one of the most established vendors for managed UC for enterprises. This strong position is the consequence of different facts. First of all, Cisco is very strong in the enterprise market in general. Secondly, Cisco has literally pushed managed service — and hosted services generally speaking — through a close support strategy for its partners and has provided associated certifications (Cisco Managed Services Express, Master etc.) accordingly. As outsider, Microsoft Lync is clearly getting more popular and could soon replace Avaya as second most established vendor.

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