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MANAGED SERVICES MARKET

By Managed Data Center, Managed Network, Managed Information, Managed Mobility, Managed Infrastructure, Managed Communications, Managed Security

GLOBAL FORECAST TO 2019

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1 INTRODUCTION

1.1 OBJECTIVES OF THE STUDY

- To define, describe, and forecast the managed services market on the basis of technology segment, end users, and regions
- To provide a detailed information regarding the major factors influencing the growth of the managed services market (drivers, restraints, opportunities, industry specific challenges, winning imperatives, and burning issues)
- To strategically analyze micromarkets[1] with respect to individual growth trends, future prospects, and contribution to the total managed services market
- To analyze and forecast the managed services by market value and size
- To analyze the opportunities in the market for stakeholders and details of a competitive landscape for market leaders
- To forecast the market size of market segments with respect to five main regions, namely, North America (NA), Europe, Asia-Pacific (APAC), Middle East and Africa (MEA), and Latin America (LA)
- To strategically profile key players and comprehensively analyze their market shares and core competencies[2]
- To track and analyze recent developments such as joint ventures, mergers and acquisitions, new product developments, and research and developments in the global managed services market

1. Micro markets are defined as the further segments and sub-segments of the global managed network services market included in the report.
2. Core competencies of the companies are captured in terms of their key developments, SWOT analysis, and key strategies adopted by them to sustain their position in the market.

1.2 MARKET DEFINITION

The managed services report provides a brief on the managed services market. The report covers all the major sub-segments of the managed services such as managed data center, managed network, managed information, managed mobility, managed infrastructure, managed communications and managed security and provides the quantitative (market size and market growth) and qualitative (trends, analysis, and insights) for those segments. This comprehensive coverage of the managed services market provides important inputs, such as drivers, restraints, and opportunities in this market, profiles the major players in this market, maps the competitive landscape, and provides the overall managed services market in the various end users and regions.

1.3 MARKET SCOPE

The purpose of the report is to segment this market in the best possible manner, covering this market comprehensively, to provide the closest approximations of the revenue numbers for the different sub-segments, and to allow the readers to have a clear understanding of this vast market.

1.3.1 MARKETS COVERED

This research report categorizes the managed services market into the following segments:

FIGURE 1 MANAGED SERVICES MARKET, BY TECHNOLOGY SEGMENT

Managed services market, by managed data center

- Managed hosting
- Managed colocation
- Managed storage

Managed services market, by managed network

- Managed network monitoring and maintenance (Remote monitoring)
- Managed Multiprotocol Label Switching, Virtual Private Networks (MPLS VPNs)
- Managed Ethernet access (over LAN, WAN, MAN, VLAN, Gateways)
- Managed WLAN/WWAN
- Managed Router and Switch
- Others

Managed services market, by managed mobility

- Managed mobile Value-Added Service (VAS)
- Managed mobile security
- Managed tablets, smartphones, and mobiles
- Others

Managed services market, by managed infrastructure

- Managed Print Services (MPS)
- Managed desktop
- Managed backup and recovery (IT maintenance)
- Managed servers
- Managed inventory
- Others

Managed services market, by managed communications

- Managed unified communications
- Managed email communications
- Managed Voice over Internet Protocol (VoIP) communications

Managed services market, by managed information

- Managed business process
- Managed Operations Support System/Business Support System (OSS/BSS)
- Managed database
- Others

Managed services market, by managed security

- Managed infrastructure content security (Antivirus, software patches, and others)
- Managed internet security
- Managed video surveillance/managed Wi-Fi security
- Managed firewall and managed Virtual Private Network (VPN) security
- Managed Intrusion Detection System/Intrusion Prevention System (IDS/IPS)
- Others

FIGURE 2 MANAGED SERVICES MARKET, BY END USER

Small Office Home Office (SOHO)

Small and Medium Businesses (SMBs)

Large Enterprises

FIGURE 3 MANAGED SERVICES MARKET, BY REGION

North America

Europe

Asia-Pacific

Middle East and Africa

Latin America

1.3.2 STAKEHOLDERS

- IT Service Providers
- Telecom Operators
- System Integrators
- Communication Equipment Providers
- Cloud Service Providers
- Data Center Vendors
- Standardization Bodies and Government Council
- Infrastructure Architects
- Enterprise Data Center Professionals
- Software Providers
- Wireless Operators and Supplies
- Third-Party Suppliers

1.3.3 YEARS

- Historical Year –2012
- Base Year – 2013
- Estimated Year – 2014
- Forecast Year – 2019

1.3.4 CURRENCY

The base currency used in the report is U.S. dollars, with market size indicated only in $million.

- For companies reporting their revenues in U.S. dollars, the revenues were picked from their annual report.
- For companies that reported their revenues in other currencies, average annual currency conversion rate was used for the particular year to convert the value to U.S. dollars.

2 EXECUTIVE SUMMARY

Managed services enable organizations to outsource its entire or a part of the IT infrastructure and operations to focus on their key business goals. Outsourcing helps companies to reduce the cost incurred on network and IT spending by eliminating Capital Expenditure (CAPEX) and Operational Expenditure (OPEX). More than a cost control tool, it also helps the organizations to avail a competitive advantage by improving efficiency and providing business differentiation. Managed services objectives are highly compound; therefore Managed Service Providers (MSPs) manage in-house functionalities through its skilled resource pool and MSPs offer flexibility to the company for expansion and diversification. The managed services market is witnessing accelerated growth in the recent years due to the advancements in cloud computing, big data, and mobility services. Managed services reduce the recurring in-house IT costs by XX% and bring about XX% increase in efficiency.

The managed services domain is broadly classified into Application Service Providers (ASPs) and MSPs. The ASPs are vendors of advanced telecommunication equipment and providers of value added managed services. The MSPs are partners to ASPs and comprise Independent Software Vendors (ISVs), telcos, and system integrators. The MSPs take the main responsibility of providing the managed services functionalities, such as support, billing, and other business processes to customers. While most industry MSPs offer vendor-specific managed services, there is an increasing demand for expertise in vendor-neutral managed services. Most top vendors in this domain offer a vendor neutral managed services as well as cater to customer's specific vendor requirements. The managed services offerings usually support a multi-vendor and multi-technology environment. Managed services involve Operational Level Agreement (OLA) between the ASP and MSP, wherein both parties agree upon the service levels, quality, duration, revenue sharing and other business rules and regulations. Service Level Agreement (SLA) exists between the customer and the service providers, wherein the service parameters are based on Key Performance Indicators (KPIs) for a preset price. This includes the provision of managed services at an hour to hour basis. Managed services ensure revival of the customer from all the routine IT work that was handled earlier, post MSP taking over the customer's infrastructure, network or both, with the total ownership rights still remaining with the end user. The managed services market is witnessing an increasing keen interest in managed mobility and information services.

This report covers the adoption trends in the managed services segments and other sub-segments. This research covers in-depth technology segments of the global managed services market. This research provides insights into the current revenue realization and future revenue opportunities in the managed services market from 2014 through 2019. This report is aimed to provide the reader with an understanding of market drivers, current and upcoming players, competitive landscape, restraints and future market opportunities.

The managed services market size is expected to grow from $XX billion in 2014 to $XX billion by 2019, at an estimated Compound Annual Growth Rate (CAGR) of XX% during the forecast period.

TABLE 1 MANAGED SERVICES MARKET SIZE, BY TECHNOLOGY SEGMENT, 2012-2019 ($BILLION)

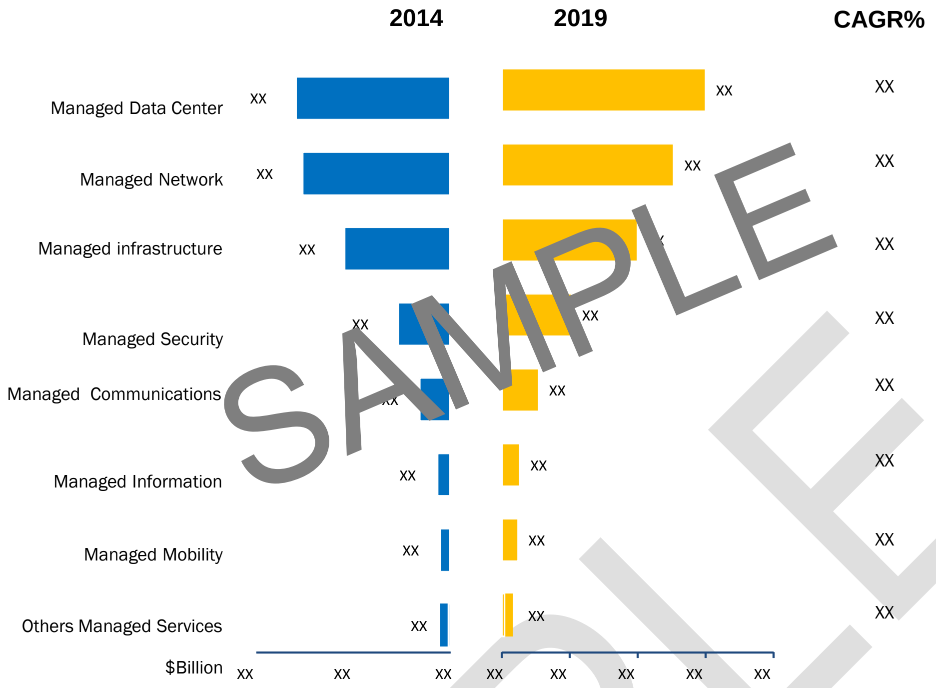
Technology Segment	2012	2013	2014-e	2019-p	CAGR (2014-2019)
Managed Data Center	XX	XX	XX	XX	XX
Managed Network	XX	XX	XX	XX	XX
Managed Mobility	XX	XX	XX	XX	XX
Managed Infrastructure	XX	XX	XX	XX	XX
Managed Communications	XX	XX	XX	XX	XX
Managed Information	XX	XX	XX	XX	XX
Managed Security	XX	XX	XX	XX	XX
Other Managed Services	XX	XX	XX	XX	XX
Total	**XX**	**XX**	**XX**	**XX**	**XX**

e – Estimate, p – Projected

Sources: Secondary Literature, Expert Interviews, and MarketsandMarkets Analysis

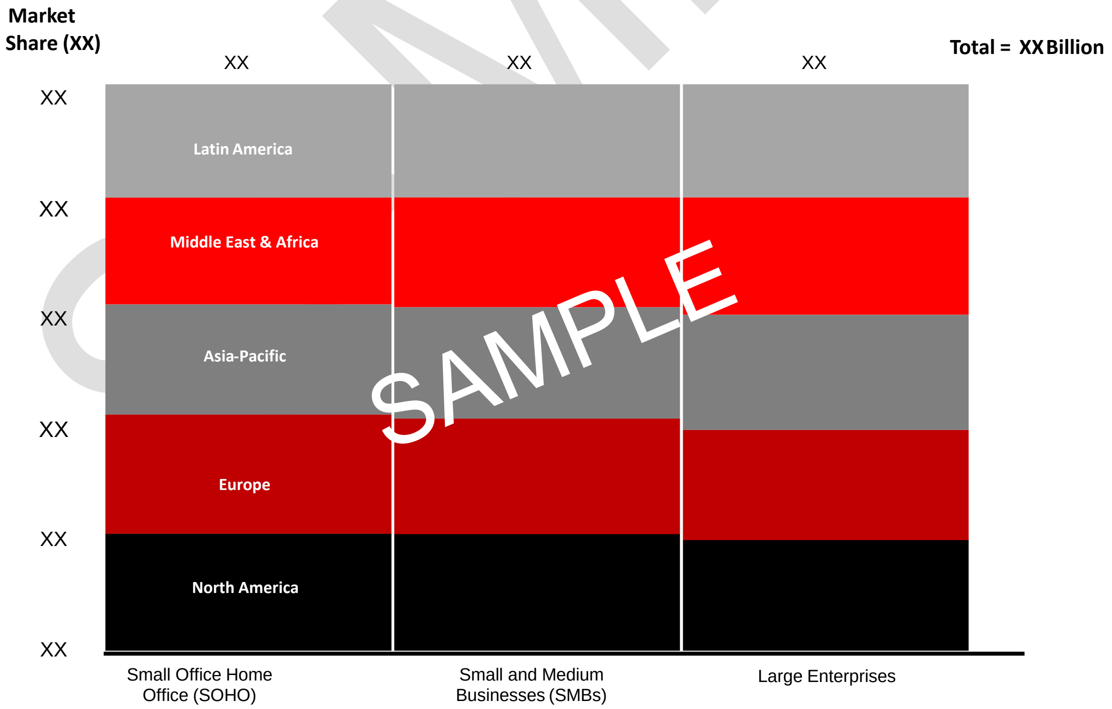
The table given above highlights the managed services market size. The managed services market size is expected to grow from $XX billion in 2014 to $XX billion by 2019, at an estimated CAGR of XX%. The managed data center market size in the managed services ecosystem is expected to grow from $XX billion in 2014 to $XX billion by 2019, at an estimated CAGR of XX%. The managed network services market size in managed services ecosystem is expected to grow from $XX billion in 2014 to $XX billion by 2019, at an estimated CAGR of XX%. The managed mobility market size in the managed services ecosystem is expected to grow from $XX billion in 2014 to $XX billion by 2019, at an estimated CAGR of XX%. The managed infrastructure services market size in managed services ecosystem is expected to grow from $XX billion in 2014 to $XX billion by 2019, at an estimated CAGR of XX%. The managed communication services market size in managed services ecosystem is expected to grow from $XX billion in 2014 to $XX billion by 2019, at an estimated CAGR of XX%. The managed information market size in the managed services ecosystem is expected to grow from $XX billion in 2014 to $XX billion by 2019, at an estimated CAGR of XX%. The managed security services market size in managed services ecosystem is expected to grow from $XX billion in 2014 to $XX billion by 2019, at an estimated CAGR of XX%. The benefits of cost reduction, increased flexibility and agility to the end businesses are driving the market for managed services. Various companies are outsourcing their in-house functionalities for better focus towards core competencies, competitiveness, and growth. This in turn, continuously pushes the managed services market towards growth.

FIGURE 4 MANAGED DATA CENTER COVERING THE MAXIMUM SHARE OF MANAGED SERVICES MARKET (2014 VS. 2019)



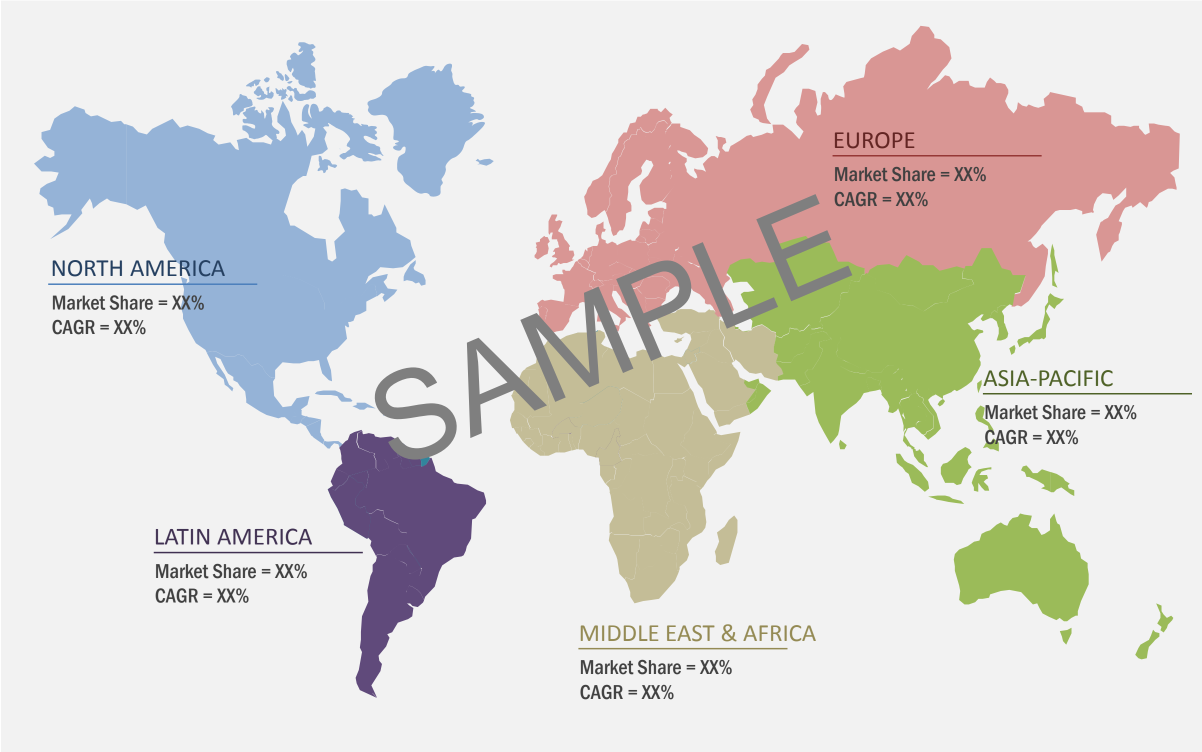
Sources: Secondary Literature, Expert Interviews, and MarketsandMarkets Analysis

FIGURE 5 MANAGED SERVICES MARKET SHARE, BY END USER, 2014



Sources: Secondary Literature, Expert Interviews, and MarketsandMarkets Analysis

FIGURE 6 THE GROWING DATA CENTER IS DRIVING THE DEMAND OF MANAGED SERVICES IN APAC



Sources: Secondary Literature, Expert Interviews, and MarketsandMarkets Analysis

North America accounted for the largest market share, i.e. XX% of the managed services market in 2014, followed by Europe. A lot of companies such as, Alcatel-Lucent, Ericsson, and Nokia Solutions and Networks offer managed services in the region. Enterprise's more immediate steps to improve network efficiency and cost controls by moving towards MSPs are driving the market. MEA is expected to grow at the highest rate in the next XX years with a CAGR of XX% during the forecast period.