

Global Managed Security Services Market Size Study & Forecast, by Security Type (Cloud Security, End-point Security, Network Security, Data Security, Others), By Services (Managed SIEM, Managed UTM, Managed DDoS, Managed XDR, Managed IAM, Managed Risk & Compliance), By Enterprise Size (Large enterprises, SMEs), By Vertical (BFSI, Healthcare, Manufacturing, IT & Telecommunications, Retail, Defense/Government, Others), and Regional Analysis, 2023-2030

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Abstracts

Global Managed Security Services Market is valued approximately at USD 27.2 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 15.4% over the forecast period 2023-2030. Managed Security Services (MSS) refer to outsourced security solutions and expertise provided by third-party vendors to help organizations protect their digital assets, networks and systems from cybersecurity threats. MSS providers offer a range of services, including threat monitoring, incident response, vulnerability management, security assessments, compliance management, and security consulting. These services are designed to enhance organizations' cybersecurity posture, mitigate risks, detect and respond to security incidents promptly and ensure compliance with regulatory requirements. MSS providers leverage advanced technologies, threat intelligence, and skilled security professionals to deliver comprehensive and proactive security solutions tailored to the specific needs of their clients. These providers offer cost-effective and reliable security solutions that assist businesses in securing their sensitive information, thereby protecting their overall

operations.

The rise in cybercrime activities, cost efficiency, and stringent government regulations are the most prominent factors that are propelling the market demand across the globe. Additionally, the growing adoption of mobile devices in workplaces and the increase in electronic data contribute to market growth at a substantial rate.

In addition, the rising complexity of cyber threats is exhibiting a positive influence on the growth of the Managed Security Services Market. The digital transformation era has become a breeding ground for cybercriminals targeting vulnerabilities in online systems, networks, and infrastructure. This has profound economic and social repercussions globally, affecting governments, businesses, and individuals alike. Cybercriminals are continuously devising with innovative and complex attack techniques. The current threat landscape change too quickly for traditional security solutions to keep up. Advanced security knowledge and resources are provided by MSS providers to successfully counter these sophisticated attacks. Cyber threats such as phishing, ransomware, and data breaches are prevalent, with new types of cybercrimes continually emerging. Cybercriminals demonstrate increased agility and organization, leveraging advanced technologies, tailoring their attacks, and collaborating in novel ways. According to the FBI's Internet Crime Report 2021, there were 847,376 reported cybercrime complaints, marking a 7% increase from 2020. The escalating complexity of cyber threats has spurred a trend toward outsourcing security operations for many organizations. Moreover, the rise in adoption of cloud technology and IoT devices, as well as the growing demand for advanced cybersecurity measures presents various lucrative opportunities over the forecasting years. However, the concerns about sharing sensitive data and the limited capabilities for threat-hunting and incident-response services are hindering the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Managed Security Services Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 with largest market share owing to the soaring demand for outsourcing services from various tech giants. The expansion of managed service offerings tailored to individual needs, coupled with the rising demand for cloud computing, network security, and data security solutions, is anticipated to bolster regional growth. Additionally, the increasing number, diversity, and sophistication of cyber threats aimed at expanding exposure footprints are driving market demand. Whereas, Asia Pacific is expected to grow at the highest CAGR over the forecast years. The rising demand for outsourcing services from third-party providers, rapid digitalization, escalating cybersecurity threats are significantly

propelling the market demand across the region. The growth of Managed Security Services (MSS) in the region is further fueled by the scarcity of skilled cybersecurity professionals. While many large organizations have their own Security Operations Centers (SOCs), they lack sufficient human resources to optimize these centers fully, thus turning to MSSP vendors for outsourcing services. Small and Medium Enterprises (SMEs), constrained by financial limitations, rely on outsourcing their cybersecurity management and operations within a reasonable price range.

Major market players included in this report are:

AT&T Inc.

BAE Systems, Inc.

Cisco Systems, Inc.

Check Point Software Technologies Ltd.

Fortinet, Inc.

Fujitsu Limited

International Business Machines Corporation (IBM)

Palo Alto Networks, Inc.

Verizon Communications Inc.

Wipro Limited

Recent Developments in the Market:

In November 2022, Fortinet announced the introduction of the FortiGate Cloud-Native Firewall on Amazon Web Services. This innovative firewall is designed to swiftly detect both internal and external threats in real-time.

In September 2022, Check Point Software Technologies Ltd. unveiled Check Point Horizon, a cutting-edge suite focused on preventing future cyberattacks and bolstering defense measures across network and cloud endpoints. This

suite is showing company's potential advancement for the proactive cybersecurity strategies.

In September 2022, Fujitsu Limited and Fujitsu Australia and New Zealand made a strategic acquisition by purchasing New Zealand's cybersecurity firm, InPhySec. This acquisition aims to enhance security protocols and offer professional services, empowering customers on their digital transformation journey.

Global Managed Security Services Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Security Type, Services, Enterprise Size, Vertical, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest

along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Security Type:

Cloud Security

End-point Security

Network Security

Data Security

Others

By Services:

Managed SIEM

Managed UTM

Managed DDoS

Managed XDR

Managed IAM

Managed Risk & Compliance

By Enterprise Size:

Large enterprises

SMEs

By Vertical:

BFSI

Healthcare

Manufacturing

IT & Telecommunications

Retail

Defense/Government

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

Contents

CHAPTER 1. EXECUTIVE SUMMARY

- 1.1. Market Snapshot
- 1.2. Global & Segmental Market Estimates & Forecasts, 2020-2030 (USD Billion)
 - 1.2.1. Managed Security Services Market, by region, 2020-2030 (USD Billion)
 - 1.2.2. Managed Security Services Market, by Security Type, 2020-2030 (USD Billion)
 - 1.2.3. Managed Security Services Market, by Services, 2020-2030 (USD Billion)
 - 1.2.4. Managed Security Services Market, by Enterprise Size, 2020-2030 (USD Billion)
 - 1.2.5. Managed Security Services Market, by Vertical, 2020-2030 (USD Billion)
- 1.3. Key Trends
- 1.4. Estimation Methodology
- 1.5. Research Assumption

CHAPTER 2. GLOBAL MANAGED SECURITY SERVICES MARKET DEFINITION AND SCOPE

- 2.1. Objective of the Study
- 2.2. Market Definition & Scope
 - 2.2.1. Industry Evolution
 - 2.2.2. Scope of the Study
- 2.3. Years Considered for the Study
- 2.4. Currency Conversion Rates

CHAPTER 3. GLOBAL MANAGED SECURITY SERVICES MARKET DYNAMICS

- 3.1. Managed Security Services Market Impact Analysis (2020-2030)
 - 3.1.1. Market Drivers
 - 3.1.1.1. Stringent government regulations
 - 3.1.1.2. Increase in volume of electronic data
 - 3.1.1.3. Rising complexity of cyber threats
 - 3.1.2. Market Challenges
 - 3.1.2.1. Growing concerns about sharing sensitive data
 - 3.1.2.2. Limited capabilities for threat-hunting & incident-response services
 - 3.1.3. Market Opportunities
 - 3.1.3.1. Rise in adoption of cloud technology and IoT devices
 - 3.1.3.2. Growing demand for advanced cybersecurity measures

CHAPTER 4. GLOBAL MANAGED SECURITY SERVICES MARKET: INDUSTRY ANALYSIS

- 4.1. Porter's 5 Force Model
 - 4.1.1. Bargaining Power of Suppliers
 - 4.1.2. Bargaining Power of Buyers
 - 4.1.3. Threat of New Entrants
 - 4.1.4. Threat of Substitutes
 - 4.1.5. Competitive Rivalry
- 4.2. Porter's 5 Force Impact Analysis
- 4.3. PEST Analysis
 - 4.3.1. Political
 - 4.3.2. Economic
 - 4.3.3. Social
 - 4.3.4. Technological
 - 4.3.5. Environmental
 - 4.3.6. Legal
- 4.4. Top investment opportunity
- 4.5. Top winning strategies
- 4.6. COVID-19 Impact Analysis
- 4.7. Disruptive Trends
- 4.8. Industry Expert Perspective
- 4.9. Analyst Recommendation & Conclusion

CHAPTER 5. GLOBAL MANAGED SECURITY SERVICES MARKET, BY SECURITY TYPE

- 5.1. Market Snapshot
- 5.2. Global Managed Security Services Market by Security Type, Performance - Potential Analysis
- 5.3. Global Managed Security Services Market Estimates & Forecasts by Security Type 2020-2030 (USD Billion)
- 5.4. Managed Security Services Market, Sub Segment Analysis
 - 5.4.1. Cloud Security
 - 5.4.2. End-point Security
 - 5.4.3. Network Security
 - 5.4.4. Data Security
 - 5.4.5. Others

CHAPTER 6. GLOBAL MANAGED SECURITY SERVICES MARKET, BY SERVICES

- 6.1. Market Snapshot
- 6.2. Global Managed Security Services Market by Services, Performance - Potential Analysis
- 6.3. Global Managed Security Services Market Estimates & Forecasts by Services 2020-2030 (USD Billion)
- 6.4. Managed Security Services Market, Sub Segment Analysis
 - 6.4.1. Managed SIEM
 - 6.4.2. Managed UTM
 - 6.4.3. Managed DDoS
 - 6.4.4. Managed XDR
 - 6.4.5. Managed IAM
 - 6.4.6. Managed Risk & Compliance

CHAPTER 7. GLOBAL MANAGED SECURITY SERVICES MARKET, BY ENTERPRISE SIZE

- 7.1. Market Snapshot
- 7.2. Global Managed Security Services Market by Enterprise Size, Performance - Potential Analysis
- 7.3. Global Managed Security Services Market Estimates & Forecasts by Enterprise Size 2020-2030 (USD Billion)
- 7.4. Managed Security Services Market, Sub Segment Analysis
 - 7.4.1. Large enterprises
 - 7.4.2. SMEs

CHAPTER 8. MANAGED SECURITY SERVICES MARKET, BY VERTICAL

- 8.1. Market Snapshot
- 8.2. Global Managed Security Services Market by Vertical, Performance - Potential Analysis
- 8.3. Global Managed Security Services Market Estimates & Forecasts by Vertical 2020-2030 (USD Billion)
- 8.4. Managed Security Services Market, Sub Segment Analysis
 - 8.4.1. BFSI
 - 8.4.2. Healthcare
 - 8.4.3. Manufacturing
 - 8.4.4. IT & Telecommunications

- 8.4.5. Retail
- 8.4.6. Defense/Government
- 8.4.7. Others

CHAPTER 9. GLOBAL MANAGED SECURITY SERVICES MARKET, REGIONAL ANALYSIS

- 9.1. Top Leading Countries
- 9.2. Top Emerging Countries
- 9.3. Managed Security Services Market, Regional Market Snapshot
- 9.4. North America Managed Security Services Market
 - 9.4.1. U.S. Managed Security Services Market
 - 9.4.1.1. Security Type breakdown estimates & forecasts, 2020-2030
 - 9.4.1.2. Services breakdown estimates & forecasts, 2020-2030
 - 9.4.1.3. Enterprise Size breakdown estimates & forecasts, 2020-2030
 - 9.4.1.4. Vertical breakdown estimates & forecasts, 2020-2030
 - 9.4.2. Canada Managed Security Services Market
- 9.5. Europe Managed Security Services Market Snapshot
 - 9.5.1. U.K. Managed Security Services Market
 - 9.5.2. Germany Managed Security Services Market
 - 9.5.3. France Managed Security Services Market
 - 9.5.4. Spain Managed Security Services Market
 - 9.5.5. Italy Managed Security Services Market
 - 9.5.6. Rest of Europe Managed Security Services Market
- 9.6. Asia-Pacific Managed Security Services Market Snapshot
 - 9.6.1. China Managed Security Services Market
 - 9.6.2. India Managed Security Services Market
 - 9.6.3. Japan Managed Security Services Market
 - 9.6.4. Australia Managed Security Services Market
 - 9.6.5. South Korea Managed Security Services Market
 - 9.6.6. Rest of Asia Pacific Managed Security Services Market
- 9.7. Latin America Managed Security Services Market Snapshot
 - 9.7.1. Brazil Managed Security Services Market
 - 9.7.2. Mexico Managed Security Services Market
- 9.8. Middle East & Africa Managed Security Services Market
 - 9.8.1. Saudi Arabia Managed Security Services Market
 - 9.8.2. South Africa Managed Security Services Market
 - 9.8.3. Rest of Middle East & Africa Managed Security Services Market

CHAPTER 10. COMPETITIVE INTELLIGENCE

- 10.1. Key Company SWOT Analysis
 - 10.1.1. Company
 - 10.1.2. Company
 - 10.1.3. Company
- 10.2. Top Market Strategies
- 10.3. Company Profiles
 - 10.3.1. AT&T Inc.
 - 10.3.1.1. Key Information
 - 10.3.1.2. Overview
 - 10.3.1.3. Financial (Subject to Data Availability)
 - 10.3.1.4. Product Summary
 - 10.3.1.5. Recent Developments
 - 10.3.2. BAE Systems, Inc.
 - 10.3.3. Cisco Systems, Inc.
 - 10.3.4. Check Point Software Technologies Ltd.
 - 10.3.5. Fortinet, Inc.
 - 10.3.6. Fujitsu Limited
 - 10.3.7. International Business Machines Corporation (IBM)
 - 10.3.8. Palo Alto Networks, Inc.
 - 10.3.9. Verizon Communications Inc.
 - 10.3.10. Wipro Limited

CHAPTER 11. RESEARCH PROCESS

- 11.1. Research Process
 - 11.1.1. Data Mining
 - 11.1.2. Analysis
 - 11.1.3. Market Estimation
 - 11.1.4. Validation
 - 11.1.5. Publishing
- 11.2. Research Attributes
- 11.3. Research Assumption

List Of Tables

LIST OF TABLES

TABLE 1. Global Managed Security Services Market, report scope

TABLE 2. Global Managed Security Services Market estimates & forecasts by region 2020-2030 (USD Billion)

TABLE 3. Global Managed Security Services Market estimates & forecasts by Security Type 2020-2030 (USD Billion)

TABLE 4. Global Managed Security Services Market estimates & forecasts by Services 2020-2030 (USD Billion)

TABLE 5. Global Managed Security Services Market estimates & forecasts by Enterprise Size 2020-2030 (USD Billion)

TABLE 6. Global Managed Security Services Market estimates & forecasts by Vertical 2020-2030 (USD Billion)

TABLE 7. Global Managed Security Services Market by segment, estimates & forecasts, 2020-2030 (USD Billion)

TABLE 8. Global Managed Security Services Market by region, estimates & forecasts, 2020-2030 (USD Billion)

TABLE 9. Global Managed Security Services Market by segment, estimates & forecasts, 2020-2030 (USD Billion)

TABLE 10. Global Managed Security Services Market by region, estimates & forecasts, 2020-2030 (USD Billion)

TABLE 11. Global Managed Security Services Market by segment, estimates & forecasts, 2020-2030 (USD Billion)

TABLE 12. Global Managed Security Services Market by region, estimates & forecasts, 2020-2030 (USD Billion)

TABLE 13. Global Managed Security Services Market by segment, estimates & forecasts, 2020-2030 (USD Billion)

TABLE 14. Global Managed Security Services Market by region, estimates & forecasts, 2020-2030 (USD Billion)

TABLE 15. Global Managed Security Services Market by segment, estimates & forecasts, 2020-2030 (USD Billion)

TABLE 16. Global Managed Security Services Market by region, estimates & forecasts, 2020-2030 (USD Billion)

TABLE 17. U.S. Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 18. U.S. Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 19. U.S. Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 20. Canada Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 21. Canada Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 22. Canada Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 23. UK Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 24. UK Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 25. UK Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 26. Germany Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 27. Germany Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 28. Germany Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 29. France Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 30. France Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 31. France Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 32. Italy Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 33. Italy Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 34. Italy Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 35. Spain Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 36. Spain Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 37. Spain Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 38. RoE Managed Security Services Market estimates & forecasts, 2020-2030

(USD Billion)

TABLE 39. RoE Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 40. RoE Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 41. China Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 42. China Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 43. China Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 44. India Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 45. India Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 46. India Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 47. Japan Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 48. Japan Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 49. Japan Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 50. South Korea Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 51. South Korea Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 52. South Korea Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 53. Australia Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 54. Australia Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 55. Australia Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 56. RoAPAC Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 57. RoAPAC Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 58. RoAPAC Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 59. Brazil Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 60. Brazil Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 61. Brazil Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 62. Mexico Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 63. Mexico Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 64. Mexico Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 65. RoLA Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 66. RoLA Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 67. RoLA Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 68. Saudi Arabia Managed Security Services Market estimates & forecasts, 2020-2030 (USD Billion)

TABLE 69. South Africa Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 70. RoMEA Managed Security Services Market estimates & forecasts by segment 2020-2030 (USD Billion)

TABLE 71. List of secondary sources, used in the study of global Managed Security Services Market

TABLE 72. List of primary sources, used in the study of global Managed Security Services Market

TABLE 73. Years considered for the study

TABLE 74. Exchange rates considered

List of tables and figures and dummy in nature, final lists may vary in the final deliverable

List Of Figures

LIST OF FIGURES

- FIG 1. Global Managed Security Services Market, research methodology
 - FIG 2. Global Managed Security Services Market, Market estimation techniques
 - FIG 3. Global Market size estimates & forecast methods
 - FIG 4. Global Managed Security Services Market, key trends 2022
 - FIG 5. Global Managed Security Services Market, growth prospects 2023-2030
 - FIG 6. Global Managed Security Services Market, porters 5 force model
 - FIG 7. Global Managed Security Services Market, pest analysis
 - FIG 8. Global Managed Security Services Market, value chain analysis
 - FIG 9. Global Managed Security Services Market by segment, 2020 & 2030 (USD Billion)
 - FIG 10. Global Managed Security Services Market by segment, 2020 & 2030 (USD Billion)
 - FIG 11. Global Managed Security Services Market by segment, 2020 & 2030 (USD Billion)
 - FIG 12. Global Managed Security Services Market by segment, 2020 & 2030 (USD Billion)
 - FIG 13. Global Managed Security Services Market by segment, 2020 & 2030 (USD Billion)
 - FIG 14. Global Managed Security Services Market, regional snapshot 2020 & 2030
 - FIG 15. North America Managed Security Services Market 2020 & 2030 (USD Billion)
 - FIG 16. Europe Managed Security Services Market 2020 & 2030 (USD Billion)
 - FIG 17. Asia pacific Managed Security Services Market 2020 & 2030 (USD Billion)
 - FIG 18. Latin America Managed Security Services Market 2020 & 2030 (USD Billion)
 - FIG 19. Middle East & Africa Managed Security Services Market 2020 & 2030 (USD Billion)
- List of tables and figures and dummy in nature, final lists may vary in the final deliverable

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