

Global Managed Security Services (MSS) Market Size Study and Forecast by Deployment Model (On-Premise, Cloud), by Service Type (Managed Detection and Response (MDR), Firewall and UTM Management, Intrusion Detection/Prevention, Managed IAM and Zero-Trust, DDoS and Threat Prevention, Vulnerability and Patch Management, Others), by Provider Type (IT Service Integrators, Security-Specialist MSSPs, Telecom-Led MSSPs, Cloud Hyperscaler MSSPs, Consulting-Led Cyber Practices), by End-user Industry (BFSI, Government and Defense, Healthcare and Life Sciences, Manufacturing and Industrial, Retail and eCommerce, IT and Telecom, Energy and Utilities), and Regional Forecasts 2026-2035

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Abstracts

Managed Security Services (MSS) refer to outsourced cybersecurity solutions delivered by specialized providers to monitor, detect, prevent, and respond to cyber threats across enterprise IT environments. These services encompass network security management, endpoint protection, identity and access management, threat intelligence, vulnerability assessment, and incident response. The ecosystem includes managed security service providers (MSSPs), cloud hyperscalers, telecom operators, IT service integrators, consulting-led cyber practices, and enterprise end users across regulated and high-risk industries.

In recent years, the MSS market has evolved from traditional perimeter-focused monitoring toward integrated, intelligence-driven security operations. The rapid shift to cloud computing, hybrid work models, and digital transformation initiatives has expanded attack surfaces, increasing reliance on outsourced security expertise. Zero-trust architectures, AI-enabled threat analytics, and security orchestration platforms are redefining service delivery models. Additionally, regulatory mandates concerning data privacy and cyber resilience are accelerating adoption across BFSI, healthcare, and government sectors. The market is positioned for sustained expansion through 2035, supported by persistent cyber threat complexity and enterprise demand for scalable, cost-efficient security operations.

Key Findings of the Report

Market Size (2024): USD 43.03 billion

Estimated Market Size (2035): USD 137.64 billion

CAGR (2026-2035): 12.33%

Leading Regional Market: North America

Leading Segment: Managed Detection and Response (MDR) under Service Type

Market Determinants

Escalating Cyber Threat Landscape

The increasing sophistication of ransomware, advanced persistent threats, and distributed denial-of-service attacks is driving enterprises to adopt continuous monitoring and incident response capabilities. MSS providers offer 24/7 security operations, reducing breach impact and operational risk, which directly supports enterprise resilience.

Shortage of Skilled Cybersecurity Professionals

A global talent gap in cybersecurity expertise is compelling organizations to outsource

complex security functions. MSS solutions provide access to specialized analysts and advanced threat intelligence without requiring in-house capability expansion, improving cost efficiency and scalability.

Cloud Adoption and Hybrid IT Environments

The transition toward cloud-native infrastructure and hybrid IT architectures has expanded network perimeters and introduced new vulnerabilities. Cloud-based MSS offerings enable centralized visibility and protection across distributed environments, reinforcing long-term demand.

Regulatory and Compliance Pressures

Data protection regulations and sector-specific cybersecurity mandates require continuous risk monitoring and reporting. Managed services help organizations meet compliance obligations efficiently, reducing the risk of financial penalties and reputational damage.

Cost Optimization and Operational Efficiency Needs

Enterprises increasingly prioritize predictable operating expenditure models over large capital investments in security infrastructure. MSS provides subscription-based pricing structures that align with digital transformation budgets and improve resource allocation.

Opportunity Mapping Based on Market Trends

Expansion of AI-Driven Managed Detection and Response

AI and machine learning are enhancing threat detection accuracy and reducing false positives.

- Automated threat hunting and behavioral analytics

- Integration with security orchestration platforms

Zero-Trust and Identity-Centric Security Models

The growing adoption of zero-trust architectures creates opportunities for managed IAM

and identity governance services.

Continuous authentication monitoring

Policy-driven access management across hybrid environments

Industry-Specific Security Solutions

Vertical-focused MSS offerings tailored to regulatory and operational requirements provide differentiation.

Healthcare data protection frameworks

Critical infrastructure protection for energy and utilities

Cloud-Native and Hyperscaler-Led MSS Expansion

Partnerships with cloud hyperscalers enable scalable, integrated security ecosystems.

Native cloud security monitoring

Cross-platform threat intelligence sharing

Key Market Segments

By Deployment Model:

On-Premise

Cloud

By Service Type:

Managed Detection and Response (MDR)

Firewall and UTM Management

Intrusion Detection/Prevention

Managed IAM and Zero-Trust

DDoS and Threat Prevention

Vulnerability and Patch Management

Others

By Provider Type:

IT Service Integrators

Security-Specialist MSSPs

Telecom-Led MSSPs

Cloud Hyperscaler MSSPs

Consulting-Led Cyber Practices

By End-user Industry:

BFSI

Government and Defense

Healthcare and Life Sciences

Manufacturing and Industrial

Retail and eCommerce

IT and Telecom

Energy and Utilities

Value-Creating Segments and Growth Pockets

Cloud deployment currently demonstrates stronger growth momentum compared to On-Premise models, reflecting enterprise migration to cloud-native infrastructure. While traditional Firewall and UTM Management remains widely adopted, Managed Detection and Response (MDR) is expected to register the fastest growth due to its proactive threat hunting and rapid incident response capabilities.

Among provider types, Security-Specialist MSSPs hold a significant share owing to deep domain expertise, while Cloud Hyperscaler MSSPs are poised for accelerated expansion as enterprises consolidate workloads within hyperscale environments. In end-user industries, BFSI dominates due to stringent regulatory requirements and high cyber risk exposure, whereas Healthcare and Life Sciences and Energy and Utilities represent high-growth pockets driven by digitalization and critical infrastructure protection needs.

Regional Market Assessment

North America

North America leads the MSS market, supported by advanced digital infrastructure, early adoption of cloud technologies, and strong cybersecurity regulatory frameworks. The presence of major MSS providers and hyperscalers further strengthens regional dominance.

Europe

Europe demonstrates robust demand driven by stringent data protection regulations and increasing emphasis on cyber resilience across public and private sectors. Investment in zero-trust and cross-border data security initiatives contributes to sustained growth.

Asia Pacific

Asia Pacific is projected to exhibit the fastest growth, fueled by rapid digital transformation, expanding e-commerce ecosystems, and increasing cyber threats

targeting emerging economies. Growing SME adoption of managed security services enhances regional potential.

LAMEA

The LAMEA region is experiencing gradual adoption as enterprises modernize IT infrastructure and governments prioritize cybersecurity strategies. Expansion of telecom-led MSS offerings and infrastructure investments support market development.

Recent Developments

March 2024: A global MSS provider launched an AI-powered Managed Detection and Response platform, enhancing automated threat intelligence and reducing response time for enterprise clients.

November 2023: A cloud hyperscaler expanded its managed security portfolio to integrate zero-trust capabilities, strengthening its competitive positioning in cloud-native MSS.

May 2024: A telecom-led MSS provider entered a strategic partnership with a cybersecurity analytics firm to enhance DDoS and network threat prevention services, reinforcing service diversification.

Critical Business Questions Addressed

What is the projected market value and growth outlook through 2035?

The report evaluates expansion from USD 43.03 billion in 2024 to USD 137.64 billion by 2035 at a CAGR of 12.33%.

Which service types will generate the highest return on investment?

Managed Detection and Response and Managed IAM and Zero-Trust are identified as high-growth, value-creating segments.

How are deployment preferences evolving?

Cloud-based MSS solutions are gaining momentum as enterprises prioritize scalability and remote workforce security.

Which provider models offer sustainable competitive differentiation?

Security-specialist MSSPs and cloud hyperscaler-led offerings are assessed for their technological and ecosystem advantages.

What industries present the strongest demand fundamentals?

BFSI, Government and Defense, and Healthcare and Life Sciences are evaluated as priority verticals due to regulatory and threat exposure intensity.

Beyond the Forecast

Managed Security Services are transitioning from reactive monitoring to intelligence-driven, proactive cyber resilience frameworks.

The convergence of AI, zero-trust architectures, and cloud-native ecosystems will redefine competitive positioning and service differentiation.

Organizations that integrate automation, vertical specialization, and strategic cloud partnerships will shape the next phase of MSS market evolution beyond 2035.

Contents

CHAPTER 1. GLOBAL MANAGED SECURITY SERVICES (MSS) MARKET REPORT SCOPE & METHODOLOGY

- 1.1. Market Definition
- 1.2. Market Segmentation
- 1.3. Research Assumption
 - 1.3.1. Inclusion & Exclusion
 - 1.3.2. Limitations
- 1.4. Research Objective
- 1.5. Research Methodology
 - 1.5.1. Forecast Model
 - 1.5.2. Desk Research
 - 1.5.3. Top Down and Bottom-Up Approach
- 1.6. Research Attributes
- 1.7. Years Considered for the Study

CHAPTER 2. EXECUTIVE SUMMARY

- 2.1. Market Snapshot
- 2.2. Strategic Insights
- 2.3. Top Findings
- 2.4. CEO/CXO Standpoint
- 2.5. ESG Analysis

CHAPTER 3. GLOBAL MANAGED SECURITY SERVICES (MSS) MARKET FORCES ANALYSIS

- 3.1. Market Forces Shaping The Global Managed Security Services (MSS) Market (2024-2035)
- 3.2. Drivers
 - 3.2.1. Escalating Cyber Threat Landscape
 - 3.2.2. Hybrid IT Environments
 - 3.2.3. Cloud Adoption
 - 3.2.4. Regulatory and Compliance Pressures
- 3.3. Restraints
 - 3.3.1. Shortage of Skilled Cybersecurity Professionals
 - 3.3.2. Cost Optimization and Operational Efficiency Needs

3.4. Opportunities

- 3.4.1. Expansion of AI-Driven Managed Detection and Response
- 3.4.2. Zero-Trust and Identity-Centric Security Models

CHAPTER 4. GLOBAL MANAGED SECURITY SERVICES (MSS) INDUSTRY ANALYSIS

- 4.1. Porter's 5 Forces Model
- 4.2. Porter's 5 Force Forecast Model (2024-2035)
- 4.3. PESTEL Analysis
- 4.4. Macroeconomic Industry Trends
 - 4.4.1. Parent Market Trends
 - 4.4.2. GDP Trends & Forecasts
- 4.5. Value Chain Analysis
- 4.6. Top Investment Trends & Forecasts
- 4.7. Top Winning Strategies (2025)
- 4.8. Market Share Analysis (2024-2025)
- 4.9. Pricing Analysis
- 4.10. Investment & Funding Scenario
- 4.11. Impact of Geopolitical & Trade Policy Volatility on the Market

CHAPTER 5. AI ADOPTION TRENDS AND MARKET INFLUENCE

- 5.1. AI Readiness Index
- 5.2. Key Emerging Technologies
- 5.3. Patent Analysis
- 5.4. Top Case Studies

CHAPTER 6. GLOBAL MANAGED SECURITY SERVICES (MSS) MARKET SIZE & FORECASTS BY DEPLOYMENT MODEL 2026-2035

- 6.1. Market Overview
- 6.2. Global Managed Security Services (MSS) Market Performance - Potential Analysis (2025)
- 6.3. On-Premise
 - 6.3.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 6.3.2. Market size analysis, by region, 2026-2035
- 6.4. Cloud
 - 6.4.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

6.4.2. Market size analysis, by region, 2026-2035

CHAPTER 7. GLOBAL MANAGED SECURITY SERVICES (MSS) MARKET SIZE & FORECASTS BY SERVICE TYPE 2026-2035

7.1. Market Overview

7.2. Global Managed Security Services (MSS) Market Performance - Potential Analysis (2025)

7.3. Managed Detection and Response (MDR)

7.3.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

7.3.2. Market size analysis, by region, 2026-2035

7.4. Firewall and UTM Management

7.4.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

7.4.2. Market size analysis, by region, 2026-2035

7.5. Intrusion Detection/Prevention

7.5.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

7.5.2. Market size analysis, by region, 2026-2035

7.6. Managed IAM and Zero-Trust

7.6.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

7.6.2. Market size analysis, by region, 2026-2035

7.7. DDoS and Threat Prevention

7.7.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

7.7.2. Market size analysis, by region, 2026-2035

7.8. Vulnerability and Patch Management

7.8.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

7.8.2. Market size analysis, by region, 2026-2035

7.9. Others

7.9.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

7.9.2. Market size analysis, by region, 2026-2035

CHAPTER 8. GLOBAL MANAGED SECURITY SERVICES (MSS) MARKET SIZE & FORECASTS BY PROVIDER TYPE 2026-2035

8.1. Market Overview

8.2. Global Managed Security Services (MSS) Market Performance - Potential Analysis (2025)

8.3. IT Service Integrators

8.3.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

8.3.2. Market size analysis, by region, 2026-2035

- 8.4. Security-Specialist MSSPs
 - 8.4.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 8.4.2. Market size analysis, by region, 2026-2035
- 8.5. Telecom-Led MSSPs
 - 8.5.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 8.5.2. Market size analysis, by region, 2026-2035
- 8.6. Cloud Hyperscaler MSSPs
 - 8.6.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 8.6.2. Market size analysis, by region, 2026-2035
- 8.7. Consulting-Led Cyber Practices
 - 8.7.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 8.7.2. Market size analysis, by region, 2026-2035

CHAPTER 9. GLOBAL MANAGED SECURITY SERVICES (MSS) MARKET SIZE & FORECASTS BY END-USER INDUSTRY 2026-2035

- 9.1. Market Overview
- 9.2. Global Managed Security Services (MSS) Market Performance - Potential Analysis (2025)
- 9.3. BFSI
 - 9.3.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 9.3.2. Market size analysis, by region, 2026-2035
- 9.4. Government and Defense
 - 9.4.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 9.4.2. Market size analysis, by region, 2026-2035
- 9.5. Healthcare and Life Sciences
 - 9.5.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 9.5.2. Market size analysis, by region, 2026-2035
- 9.6. Manufacturing and Industrial
 - 9.6.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 9.6.2. Market size analysis, by region, 2026-2035
- 9.7. Retail and eCommerce
 - 9.7.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 9.7.2. Market size analysis, by region, 2026-2035
- 9.8. IT and Telecom
 - 9.8.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
 - 9.8.2. Market size analysis, by region, 2026-2035
- 9.9. Energy and Utilities
 - 9.9.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035

9.9.2. Market size analysis, by region, 2026-2035

CHAPTER 10. GLOBAL MANAGED SECURITY SERVICES (MSS) MARKET SIZE & FORECASTS BY REGION 2026-2035

10.1. Growth Managed Security Services (MSS) Market, Regional Market Snapshot

10.2. Top Leading & Emerging Countries

10.3. North America Managed Security Services (MSS) Market

10.3.1. U.S. Managed Security Services (MSS) Market

10.3.1.1. Deployment Model breakdown size & forecasts, 2026-2035

10.3.1.2. Service Type breakdown size & forecasts, 2026-2035

10.3.1.3. Provider Type breakdown size & forecasts, 2026-2035

10.3.1.4. End-user Industry breakdown size & forecasts, 2026-2035

10.3.2. Canada Managed Security Services (MSS) Market

10.3.2.1. Deployment Model breakdown size & forecasts, 2026-2035

10.3.2.2. Service Type breakdown size & forecasts, 2026-2035

10.3.2.3. Provider Type breakdown size & forecasts, 2026-2035

10.3.2.4. End-user Industry breakdown size & forecasts, 2026-2035

10.4. Europe Managed Security Services (MSS) Market

10.4.1. UK Managed Security Services (MSS) Market

10.4.1.1. Deployment Model breakdown size & forecasts, 2026-2035

10.4.1.2. Service Type breakdown size & forecasts, 2026-2035

10.4.1.3. Provider Type breakdown size & forecasts, 2026-2035

10.4.1.4. End-user Industry breakdown size & forecasts, 2026-2035

10.4.2. Germany Managed Security Services (MSS) Market

10.4.2.1. Deployment Model breakdown size & forecasts, 2026-2035

10.4.2.2. Service Type breakdown size & forecasts, 2026-2035

10.4.2.3. Provider Type breakdown size & forecasts, 2026-2035

10.4.2.4. End-user Industry breakdown size & forecasts, 2026-2035

10.4.3. France Managed Security Services (MSS) Market

10.4.3.1. Deployment Model breakdown size & forecasts, 2026-2035

10.4.3.2. Service Type breakdown size & forecasts, 2026-2035

10.4.3.3. Provider Type breakdown size & forecasts, 2026-2035

10.4.3.4. End-user Industry breakdown size & forecasts, 2026-2035

10.4.4. Spain Managed Security Services (MSS) Market

10.4.4.1. Deployment Model breakdown size & forecasts, 2026-2035

10.4.4.2. Service Type breakdown size & forecasts, 2026-2035

10.4.4.3. Provider Type breakdown size & forecasts, 2026-2035

10.4.4.4. End-user Industry breakdown size & forecasts, 2026-2035

- 10.4.5. Italy Managed Security Services (MSS) Market
 - 10.4.5.1. Deployment Model breakdown size & forecasts, 2026-2035
 - 10.4.5.2. Service Type breakdown size & forecasts, 2026-2035
 - 10.4.5.3. Provider Type breakdown size & forecasts, 2026-2035
 - 10.4.5.4. End-user Industry breakdown size & forecasts, 2026-2035
- 10.4.6. Rest of Europe Managed Security Services (MSS) Market
 - 10.4.6.1. Deployment Model breakdown size & forecasts, 2026-2035
 - 10.4.6.2. Service Type breakdown size & forecasts, 2026-2035
 - 10.4.6.3. Provider Type breakdown size & forecasts, 2026-2035
 - 10.4.6.4. End-user Industry breakdown size & forecasts, 2026-2035
- 10.5. Asia Pacific Managed Security Services (MSS) Market
 - 10.5.1. China Managed Security Services (MSS) Market
 - 10.5.1.1. Deployment Model breakdown size & forecasts, 2026-2035
 - 10.5.1.2. Service Type breakdown size & forecasts, 2026-2035
 - 10.5.1.3. Provider Type breakdown size & forecasts, 2026-2035
 - 10.5.1.4. End-user Industry breakdown size & forecasts, 2026-2035
 - 10.5.2. India Managed Security Services (MSS) Market
 - 10.5.2.1. Deployment Model breakdown size & forecasts, 2026-2035
 - 10.5.2.2. Service Type breakdown size & forecasts, 2026-2035
 - 10.5.2.3. Provider Type breakdown size & forecasts, 2026-2035
 - 10.5.2.4. End-user Industry breakdown size & forecasts, 2026-2035
 - 10.5.3. Japan Managed Security Services (MSS) Market
 - 10.5.3.1. Deployment Model breakdown size & forecasts, 2026-2035
 - 10.5.3.2. Service Type breakdown size & forecasts, 2026-2035
 - 10.5.3.3. Provider Type breakdown size & forecasts, 2026-2035
 - 10.5.3.4. End-user Industry breakdown size & forecasts, 2026-2035
 - 10.5.4. Australia Managed Security Services (MSS) Market
 - 10.5.4.1. Deployment Model breakdown size & forecasts, 2026-2035
 - 10.5.4.2. Service Type breakdown size & forecasts, 2026-2035
 - 10.5.4.3. Provider Type breakdown size & forecasts, 2026-2035
 - 10.5.4.4. End-user Industry breakdown size & forecasts, 2026-2035
 - 10.5.5. South Korea Managed Security Services (MSS) Market
 - 10.5.5.1. Deployment Model breakdown size & forecasts, 2026-2035
 - 10.5.5.2. Service Type breakdown size & forecasts, 2026-2035
 - 10.5.5.3. Provider Type breakdown size & forecasts, 2026-2035
 - 10.5.5.4. End-user Industry breakdown size & forecasts, 2026-2035
 - 10.5.6. Rest of APAC Managed Security Services (MSS) Market
 - 10.5.6.1. Deployment Model breakdown size & forecasts, 2026-2035
 - 10.5.6.2. Service Type breakdown size & forecasts, 2026-2035

- 10.5.6.3. Provider Type breakdown size & forecasts, 2026-2035
- 10.5.6.4. End-user Industry breakdown size & forecasts, 2026-2035
- 10.6. Latin America Managed Security Services (MSS) Market
 - 10.6.1. Brazil Managed Security Services (MSS) Market
 - 10.6.1.1. Deployment Model breakdown size & forecasts, 2026-2035
 - 10.6.1.2. Service Type breakdown size & forecasts, 2026-2035
 - 10.6.1.3. Provider Type breakdown size & forecasts, 2026-2035
 - 10.6.1.4. End-user Industry breakdown size & forecasts, 2026-2035
 - 10.6.2. Mexico Managed Security Services (MSS) Market
 - 10.6.2.1. Deployment Model breakdown size & forecasts, 2026-2035
 - 10.6.2.2. Service Type breakdown size & forecasts, 2026-2035
 - 10.6.2.3. Provider Type breakdown size & forecasts, 2026-2035
 - 10.6.2.4. End-user Industry breakdown size & forecasts, 2026-2035
- 10.7. Middle East and Africa Managed Security Services (MSS) Market
 - 10.7.1. UAE Managed Security Services (MSS) Market
 - 10.7.1.1. Deployment Model breakdown size & forecasts, 2026-2035
 - 10.7.1.2. Service Type breakdown size & forecasts, 2026-2035
 - 10.7.1.3. Provider Type breakdown size & forecasts, 2026-2035
 - 10.7.1.4. End-user Industry breakdown size & forecasts, 2026-2035
 - 10.7.2. Saudi Arabia (KSA) Managed Security Services (MSS) Market
 - 10.7.2.1. Deployment Model breakdown size & forecasts, 2026-2035
 - 10.7.2.2. Service Type breakdown size & forecasts, 2026-2035
 - 10.7.2.3. Provider Type breakdown size & forecasts, 2026-2035
 - 10.7.2.4. End-user Industry breakdown size & forecasts, 2026-2035
 - 10.7.3. South Africa Managed Security Services (MSS) Market
 - 10.7.3.1. Deployment Model breakdown size & forecasts, 2026-2035
 - 10.7.3.2. Service Type breakdown size & forecasts, 2026-2035
 - 10.7.3.3. Provider Type breakdown size & forecasts, 2026-2035
 - 10.7.3.4. End-user Industry breakdown size & forecasts, 2026-2035

CHAPTER 11. COMPETITIVE INTELLIGENCE

- 11.1. Top Market Strategies
- 11.2. AT&T
 - 11.2.1. Company Overview
 - 11.2.2. Key Executives
 - 11.2.3. Company Snapshot
 - 11.2.4. Financial Performance (Subject to Data Availability)
 - 11.2.5. Product/Services Port

- 11.2.6. Recent Development
- 11.2.7. Market Strategies
- 11.2.8. SWOT Analysis
- 11.3. IBM6
- 11.4. Secureworks
- 11.5. Verizon
- 11.6. Broadcom (Symantec)
- 11.7. Atos
- 11.8. Lumen Technologies
- 11.9. BAE Systems
- 11.10. Capgemini
- 11.11. Fujitsu

List Of Tables

LIST OF TABLES

- Table 1. Global Managed Security Services (MSS) Market, Report Scope
- Table 2. Global Managed Security Services (MSS) Market Estimates & Forecasts By Region 2024–2035
- Table 3. Global Managed Security Services (MSS) Market Estimates & Forecasts By Segment 2024–2035
- Table 4. Global Managed Security Services (MSS) Market Estimates & Forecasts By Segment 2024–2035
- Table 5. Global Managed Security Services (MSS) Market Estimates & Forecasts By Segment 2024–2035
- Table 6. Global Managed Security Services (MSS) Market Estimates & Forecasts By Segment 2024–2035
- Table 7. Global Managed Security Services (MSS) Market Estimates & Forecasts By Segment 2024–2035
- Table 8. U.S. Managed Security Services (MSS) Market Estimates & Forecasts, 2024–2035
- Table 9. Canada Managed Security Services (MSS) Market Estimates & Forecasts, 2024–2035
- Table 10. UK Managed Security Services (MSS) Market Estimates & Forecasts, 2024–2035
- Table 11. Germany Managed Security Services (MSS) Market Estimates & Forecasts, 2024–2035
- Table 12. France Managed Security Services (MSS) Market Estimates & Forecasts, 2024–2035
- Table 13. Spain Managed Security Services (MSS) Market Estimates & Forecasts, 2024–2035
- Table 14. Italy Managed Security Services (MSS) Market Estimates & Forecasts, 2024–2035
- Table 15. Rest Of Europe Managed Security Services (MSS) Market Estimates & Forecasts, 2024–2035
- Table 16. China Managed Security Services (MSS) Market Estimates & Forecasts, 2024–2035
- Table 17. India Managed Security Services (MSS) Market Estimates & Forecasts, 2024–2035
- Table 18. Japan Managed Security Services (MSS) Market Estimates & Forecasts, 2024–2035

Table 19. Australia Managed Security Services (MSS) Market Estimates & Forecasts, 2024–2035

Table 20. South Korea Managed Security Services (MSS) Market Estimates & Forecasts, 2024–2035

.....

List Of Figures

LIST OF FIGURES

- Fig 1. Global Managed Security Services (MSS) Market, Research Methodology
- Fig 2. Global Managed Security Services (MSS) Market, Market Estimation Techniques
- Fig 3. Global Market Size Estimates & Forecast Methods
- Fig 4. Global Managed Security Services (MSS) Market, Key Trends 2025
- Fig 5. Global Managed Security Services (MSS) Market, Growth Prospects 2024–2035
- Fig 6. Global Managed Security Services (MSS) Market, Porter's Five Forces Model
- Fig 7. Global Managed Security Services (MSS) Market, Pestel Analysis
- Fig 8. Global Managed Security Services (MSS) Market, Value Chain Analysis
- Fig 9. Managed Security Services (MSS) Market By End-User, 2025 & 2035
- Fig 10. Managed Security Services (MSS) Market By Segment, 2025 & 2035
- Fig 11. Managed Security Services (MSS) Market By Segment, 2025 & 2035
- Fig 12. Managed Security Services (MSS) Market By Segment, 2025 & 2035
- Fig 13. Managed Security Services (MSS) Market By Segment, 2025 & 2035
- Fig 14. North America Managed Security Services (MSS) Market, 2025 & 2035
- Fig 15. Europe Managed Security Services (MSS) Market, 2025 & 2035
- Fig 16. Asia Pacific Managed Security Services (MSS) Market, 2025 & 2035
- Fig 17. Latin America Managed Security Services (MSS) Market, 2025 & 2035
- Fig 18. Middle East & Africa Managed Security Services (MSS) Market, 2025 & 2035
- Fig 19. Global Managed Security Services (MSS) Market, Company Market Share Analysis (2025)

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