

# Managed Network Services (MNS) - A Global Market Overview

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## Abstracts

### Global Managed Network Services (MNS) Market Trends and Outlook

The global Managed Network Services (MNS) market is on a solid growth trajectory, projected to expand from US\$64.8 billion in 2024 to US\$95.0 billion by 2030, at a CAGR of 6.6%. This expansion is driven by enterprises shifting away from legacy network models to agile, secure, and scalable managed solutions that can meet the demands of hybrid work, multi-cloud adoption, and regulatory compliance. North America leads the global market due to high penetration of SD-WAN, SASE, and network automation, while Asia-Pacific is the fastest-growing region, benefiting from large-scale infrastructure upgrades and rapid 5G rollouts.

Managed SD-WAN has emerged as the fastest-growing service category, enabling optimized performance across distributed cloud environments. Network-as-a-Service (NaaS) models are also gaining traction, offering subscription-based access to enterprise-grade connectivity and security capabilities. On the security side, "Other Network Security Types," including secure web gateways, SASE, and DDoS protection, are expanding rapidly in response to escalating cyber risks. Technology convergence is redefining the MNS landscape, with providers integrating AI/ML-powered predictive analytics, edge networking capabilities, and cloud-native virtualized network functions (VNFs). This is enabling real-time monitoring, automated remediation, and flexible network orchestration that aligns with agile enterprise operations. The competitive arena remains dynamic, with telecom carriers, cloud providers, and IT service integrators vying for market share through bundled service portfolios and industry-specific solutions.

Leading vendors include AT&T, Verizon Communications, BT Group, Orange SA, Cisco

Systems, IBM, Infosys, Tata Consultancy Services, Huawei Technologies, and over 30 other global and regional providers. Competition is characterized by the convergence of connectivity, security, and analytics under unified service contracts.

### Managed Network Services (MNS) Regional Market Analysis

The global Managed Network Services market is led by North America, accounting for 37.3% of global revenue in 2024. This dominance is driven by continued investment in SD-WAN, SASE, network automation, and a mature outsourcing ecosystem, particularly among U.S.-based Fortune 500 enterprises. Looking ahead, Asia-Pacific is projected to be the fastest-growing region, expanding at a robust CAGR of 8.6% between 2024 and 2030. The region is forecast to reach US\$22.5 billion by 2030. This growth is fueled by major infrastructure overhauls, rising multi-cloud adoption, and widespread 5G rollouts in markets such as China, India, and Southeast Asia. The Rest of World region also demonstrates strong momentum, with a CAGR of 7.6%, supported by digitization efforts in the Middle East and Africa.

### Managed Network Services (MNS) Market Analysis by Service Type

In 2024, the largest service segment in the global Managed Network Services market was Managed LAN, accounting for approximately 21.6% of total market value. This segment continues to serve as the foundational layer for enterprise connectivity, with demand driven by hybrid workplace strategies, infrastructure modernization, and the need for reliable high-speed local area networks. Managed Wi-Fi was the second-largest segment, supported by increased demand for high-performance wireless connectivity across offices, campuses, and distributed retail and logistics environments. The fastest-growing segment is Managed Network Security, which is projected to expand at a CAGR of 9.8% from 2024 to 2030. Growth in this category is being driven by escalating cyber threats, zero-trust security adoption, and regulatory compliance mandates across critical industries. Organizations are increasingly bundling network security with SD-WAN and SASE to enforce unified policy control and safeguard data across hybrid environments.

### Managed Network Services (MNS) Market Analysis by Network Security Type

Within the global MNS market, Managed Firewall services represented the largest network security segment in 2024, accounting for just over 40% of total market revenue. Enterprises continue to prioritize firewall outsourcing to bolster perimeter defenses amid an increasingly distributed threat landscape. This segment is forecast to grow at a

CAGR of 6.6% through 2030, reaching US\$38.3 billion by the end of the forecast period. Other Network Security Types (which includes secure web gateways, SASE, DDoS protection, and advanced threat management services) have emerged as the fastest-growing segment, expanding at a CAGR of 6.8%. This growth reflects the rising enterprise shift toward holistic, cloud-native security models that address hybrid workforces, multi-cloud environments, and real-time threat response. As organizations consolidate security functions under managed contracts, this category is expected to capture a growing share of spend.

### Managed Network Services (MNS) Market Analysis by Deployment Type

Cloud-based deployments led the Managed Network Services market, contributing nearly 59% of global revenue in 2024. This dominance reflects the increasing enterprise reliance on cloud-native infrastructures to support distributed workforces, multi-cloud strategies, and rapid scalability. Cloud-based managed services are especially attractive for organizations seeking OPEX efficiency, faster provisioning, and reduced maintenance overheads. On-premises deployment is expected to grow at a faster CAGR of 7.4%, reaching US\$40.9 billion by 2030. The steady rise in on-prem demand is being driven by industries with stringent data sovereignty, compliance, and latency requirements, such as healthcare, government, and critical infrastructure, where localized control remains paramount. Additionally, the integration of on-prem infrastructure with edge computing and private 5G is further strengthening demand.

### Managed Network Services (MNS) Market Analysis by Company Type

In 2024, large enterprises dominated the Managed Network Services market, generating roughly 68.2% of global value. This leadership is attributed to their extensive multi-location networks, complex security and compliance needs, and strong preference for managed service models that free internal teams to focus on digital innovation. The SME segment is expected to be the fastest-growing, expanding at 7.7% CAGR. Accelerated adoption in this category is driven by the availability of cost-predictable Network-as-a-Service (NaaS) offerings, increasing reliance on cloud-hosted applications, and the need for enterprise-grade security without the burden of in-house network management. Vendors targeting SMEs are increasingly bundling connectivity, security, and monitoring into flexible subscription packages.

### Managed Network Services (MNS) Market Analysis by Industry Sector

The BFSI sector led the Managed Network Services market in 2024, accounted for

approximately 22.4% of global revenue. Its dominance is driven by the sector's high security, compliance, and uptime requirements, coupled with rapid adoption of SD-WAN and SASE to secure transactions and customer data across distributed locations. The IT & Telecom sector ranked second, benefiting from ongoing network modernization, cloud-native deployments, and the roll-out of 5G-enabled managed connectivity solutions. The fastest-growing industry is Healthcare, projected to expand at a CAGR of 9% from 2024 to 2030. Growth is propelled by telemedicine, connected medical devices, and regulatory compliance mandates such as HIPAA, which demand highly secure, resilient managed network infrastructure. Media & Entertainment is also showing strong momentum, supported by the proliferation of streaming services, content delivery networks, and edge-enabled live broadcasting.

## Managed Network Services (MNS) Market Report Scope

This global report on Managed Network Services (MNS) market analyzes the global and regional market based on Service Type, Network Security Type, Deployment Type, Company Type and Industry Sector for the period 2021-2030 with forecasts from 2024 to 2030 in terms of value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

### Key Metrics

Historical Period: 2021-2024

Base Year: 2024

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 40+

## Managed Network Services (MNS) Market by Geographic Region

North America (The United States, Canada and Mexico)

Europe (Germany, the United Kingdom, France, Italy, the Netherlands, Spain, Russia, Switzerland and Rest of Europe)

Asia-Pacific (China, Japan, India, Australia, Singapore, South Korea and Rest of Asia-Pacific)

South America (Brazil, Argentina, Colombia, Chile, Peru and Rest of South America)

America)

Middle East & Africa (the United Arab Emirates, South Africa, Egypt, Saudi Arabia, Morocco, Kuwait, Qatar and Rest of Middle East & Africa)

## Managed Network Services (MNS) Market by Service Type

Managed LAN

Managed WI-FI

Managed VPN

Managed WAN

Network Monitoring

Managed NFV

Managed Network Security

## Managed Network Services (MNS) Market by Network Security Type

Managed Firewall

Managed IDS / IPS

Other Network Security Types

## Managed Network Services (MNS) Market by Deployment Type

Cloud

On-Premises

## Managed Network Services (MNS) Market by Company Type

Large Enterprises

SMEs

## Managed Network Services (MNS) Market by Industry Sector

Banking, Financial Services, and Insurance (BFSI)

IT & Telecom

Manufacturing

Government

Healthcare

Retail & Ecommerce

Energy & Utilities

Transportation

Media & Entertainment

Other Industry Sectors

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Aryaka Networks  
AT & T Inc.  
Bigleaf Networks  
Brennan VDI Pty Ltd.  
BT Group Plc  
CenturyLink  
Cisco Systems Inc.  
Cognizant  
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Nippon Telegraph and Telephone Corp.  
Oman Data Park  
Orange SA  
SCloudx  
Servesys Inc  
Sify  
Singapore Telecommunications Limited  
Singapore Telecommunications Ltd.  
Tata Consultancy Services Ltd.  
Telefonaktiebolaget LM Ericsson  
Telefonica SA  
Telstra Corp. Ltd.  
Telstra Global  
T-Systems

Verizon Communications Inc.  
Vodafone

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Network Monitoring

Managed NFV

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SMEs

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Banking, Financial Services, and Insurance (BFSI)

IT & Telecom

Manufacturing

Government

Healthcare

Retail & Ecommerce

Energy & Utilities  
Transportation  
Media & Entertainment  
Other Industry Sectors

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