

Telecom Managed Services Market Outlook 2025-2034: Market Share, and Growth Analysis By Service Type(Managed Data Center, Managed Network Services, Managed Data and Information Services, Managed Mobility Services, Managed Communications Services, Managed Security Services), By Deployment Model(On-Premise, Cloud), By Organization Size

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Abstracts

The Telecom Managed Services Market is valued at USD 24.8 billion in 2025 and is projected to grow at a CAGR of 13.4% to reach USD 76.6 billion by 2034. The Telecom Managed Services Market has become a strategic pillar for telecom operators seeking to streamline operations, reduce costs, and accelerate digital transformation. Managed services in this context refer to third-party management of network infrastructure, IT systems, business processes, and customer support functions. With mounting operational complexities introduced by 5G rollouts, edge computing, IoT proliferation, and increased demand for digital services, telecom operators are turning to managed service providers (MSPs) for specialized expertise and scalable service delivery models. These services help operators maintain network performance, ensure regulatory compliance, enhance cybersecurity, and improve customer experience while focusing internal resources on innovation and growth. Major players in the telecom managed services space include Ericsson, Huawei, IBM, Nokia, and Tech Mahindra, each offering a mix of network, IT, data center, and customer support services tailored to telecom environments. The growing need for 24/7 service continuity, cost predictability, and rapid deployment is driving strong growth in this market, especially in emerging economies and among small-to-mid-sized telecom operators. The Telecom

Managed Services Market saw robust demand fueled by ongoing 5G network expansion and the increasing complexity of managing multi-vendor, hybrid IT environments. Telecom operators leaned on MSPs to oversee end-to-end network operations, manage service delivery platforms, and support OSS/BSS modernization. The trend toward automation and AI integration became more prominent, with managed services incorporating intelligent monitoring tools, predictive maintenance, and AI-powered fault management systems. Telecoms also prioritized outsourcing of cybersecurity functions amid rising cyber threats, with managed detection and response (MDR) services becoming standard offerings. Customer experience management services gained traction as telecoms adopted omnichannel platforms, and MSPs provided expertise in integrating CRM, billing, and self-care portals. Partnerships between telcos and MSPs evolved into co-managed models where responsibilities were shared to enhance agility and responsiveness. Moreover, managed cloud services gained momentum as operators migrated infrastructure to public and hybrid cloud environments, requiring continuous monitoring, cost governance, and performance optimization. The Telecom Managed Services Market is poised for continued expansion as operators seek greater operational resilience and strategic IT alignment. As autonomous networks and AI-driven service orchestration become mainstream, MSPs will be expected to deliver more value through intelligent automation, closed-loop assurance, and real-time service adaptability. Telecoms will increasingly adopt outcome-based managed service contracts focused on performance KPIs such as uptime, customer retention, and service quality. The rise of private 5G and edge infrastructure will drive demand for managed edge services, including localized network management and device lifecycle support. Additionally, sustainability will play a larger role in vendor selection, with telecoms favoring partners that offer energy-efficient operations and support green telecom initiatives. Managed services tailored to IoT ecosystems, vertical-specific connectivity needs, and regulatory frameworks will also emerge as key growth areas. To remain competitive, MSPs must evolve from operational support providers into innovation enablers, offering telecom clients a strategic edge in a hyper-connected, fast-evolving digital world.

Key Insights Telecom Managed Services Market

Co-managed service models are gaining popularity, where telecoms retain strategic control while outsourcing operational execution to MSPs, ensuring agility, accountability, and aligned outcomes in complex service environments.

AI and automation are increasingly embedded in managed services, supporting real-time fault resolution, network performance analytics, and proactive service

delivery improvements with minimal human intervention.

Edge network management is becoming a core focus area as telecoms deploy micro data centers and localized infrastructure to support latency-sensitive use cases like industrial IoT and autonomous systems.

Managed cybersecurity services are in high demand, with telecoms relying on MSPs for continuous threat monitoring, incident response, and compliance with evolving data protection laws.

There is growing adoption of outcome-based managed services, where performance is measured against predefined KPIs such as service uptime, SLA compliance, and user satisfaction rather than fixed resources or hours.

The complexity of managing hybrid, multi-vendor networks is pushing telecom operators to outsource operations to specialized providers that can ensure service continuity and performance optimization at scale.

Cost pressures and the need for operational efficiency are prompting telecoms to adopt managed services to reduce capital expenditures and shift to predictable, outcome-based operating models.

Expanding 5G networks and the associated technical challenges are driving demand for MSPs that can support radio, transport, and core network operations with expert engineering and real-time analytics.

The growing need for rapid time-to-market in launching new digital services is encouraging telecoms to leverage managed services for agile deployment, integration, and lifecycle management of IT and network functions.

One major challenge is managing data security and compliance risks when outsourcing critical network operations, especially as regulatory scrutiny increases and data sovereignty becomes a priority in many regions.

Telecom Managed Services Market Segmentation

By Service Type

Managed Data Center

Managed Network Services

Managed Data and Information Services

Managed Mobility Services

Managed Communications Services

Managed Security Services

By Deployment Model

On-Premise

Cloud

By Organization Size

Large Enterprises

Small and Medium Enterprises (SMEs)

Key Companies Analysed

Ericsson

Nokia Corporation

Huawei Technologies Co., Ltd.

Cisco Systems, Inc.

Hewlett Packard Enterprise (HPE)

IBM Corporation

Accenture plc

Tech Mahindra Limited

Tata Consultancy Services (TCS)

Wipro Limited

Telecom Managed Services Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modeling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends.

Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behavior are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

Telecom Managed Services Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption.

Regional insights highlight the most promising investment destinations, regulatory landscapes, and evolving partnerships across energy and industrial corridors.

Countries Covered

North America — Telecom Managed Services market data and outlook to 2034

United States

Canada

Mexico

Europe — Telecom Managed Services market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Telecom Managed Services market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Telecom Managed Services market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Telecom Managed Services market data and outlook to 2034

Brazil

Argentina

Chile

Peru

** We can include data and analysis of additional countries on demand.*

Research Methodology

This study combines primary inputs from industry experts across the Telecom Managed Services value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

Key Questions Addressed

What is the current and forecast market size of the Telecom Managed Services industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

Your Key Takeaways from the Telecom Managed Services Market Report

Global Telecom Managed Services market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Telecom Managed Services trade, costs, and supply chains

Telecom Managed Services market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Telecom Managed Services market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Telecom Managed Services market trends, drivers,

restraints, and opportunities

Porter's Five Forces analysis, technological developments, and Telecom Managed Services supply chain analysis

Telecom Managed Services trade analysis, Telecom Managed Services market price analysis, and Telecom Managed Services supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Telecom Managed Services market news and developments

Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

** The updated report will be delivered within 3 working days*

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