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Telecom Managed Services Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Service Type (Managed Data Center, Managed Network Services, Managed Data & Information Services, Managed Mobility Services, Managed Communications Services and Managed Security Services), By Deployment Mode (Cloud vs On-Premises), By Organization Size (Small and Medium Enterprises and Large Enterprises), By Region & Competition, 2021-2031F

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Abstracts

The Global Telecom Managed Services Market is projected to experience substantial growth, rising from USD 31.84 Billion in 2025 to USD 72.58 Billion by 2031, achieving a CAGR of 14.72%. This market entails operators outsourcing their network infrastructure, IT operations, and service delivery mechanisms to specialized third-party providers, a strategic model that enables communication service providers to minimize operational costs and concentrate on core business activities while vendors manage complex daily maintenance. The sector's expansion is fueled by the intensifying technical requirements of 5G and the Internet of Things, as well as the necessity to handle immense network complexity. The scale of infrastructure needing professional management is highlighted by the GSMA, which projects that mobile technologies and services will generate $6.5 trillion in economic value added in 2025.

Despite this positive outlook, the market faces significant impediments related to regulatory compliance and data security. As operators transfer responsibility for critical

infrastructure to external partners, adhering to strict data sovereignty laws becomes increasingly difficult. The reduced direct oversight regarding sensitive subscriber information and security protocols can discourage adoption, particularly in jurisdictions that enforce rigorous privacy mandates, making the assurance of data protection a primary concern for potential clients.

Market Driver

The increasing complexity of next-generation network infrastructures serves as a primary driver for the uptake of managed services. As communication service providers broaden their 5G footprint and deploy dense architectures, the sheer volume of data traffic and the intricacies of network maintenance exceed the capabilities of traditional in-house teams. Consequently, operators are relying on managed service partners to shoulder the technical responsibility of maintaining network stability and ensuring high availability. This demand is evidenced by the rapid growth in usage; according to the 'Ericsson Mobility Report' from June 2024, global mobile network data traffic surged by 25% between the first quarter of 2023 and the first quarter of 2024, creating a need for external expertise to manage the infrastructure efficiently under increasing loads.

Simultaneously, the incorporation of automation and artificial intelligence into service delivery is transforming the market. Providers are utilizing these technologies to shift from reactive maintenance to predictive operations, which significantly lowers downtime and operational expenses while allowing operators to monetize networks more effectively. The 'State of AI in Telecommunications: 2024 Survey' by NVIDIA, published in February 2024, notes that 57% of telecom respondents saw improved customer service through AI adoption, enhancing the strategic value of managed partners. The financial scale of this sector is further underscored by Huawei's 2024 report, which indicated that its ICT infrastructure business generated CNY 362 billion in revenue during the previous fiscal year, highlighting the essential role managed services play in the global telecommunications ecosystem.

Market Challenge

The growth of the Global Telecom Managed Services Market is significantly constrained by persistent challenges involving data security and regulatory compliance. As communication service providers explore outsourcing critical network functions to third-party vendors, the necessity of sharing infrastructure access and sensitive subscriber data creates substantial vulnerabilities. This transfer of control complicates compliance with stringent data sovereignty laws, as operators cannot exercise the same degree of direct oversight over security protocols as they would with internal operations. Consequently, the risk of third-party breaches fosters reluctance to adopt managed services, with operators often prioritizing risk mitigation over the potential operational efficiencies offered by outsourcing.

This cautious perspective is reinforced by recent industry trends focusing on threat prioritization. In 2024, the ITW Global Leaders Forum reported that 64% of international carriers ranked security and fraud prevention as a top strategic priority, indicating a defensive posture against rising threats. This intense focus on internal security controls correlates directly with a slower adoption rate for managed services, as operators fear that external partnerships could compromise their compliance standing and expose them to severe regulatory penalties.

Market Trends

A dominant trend is the rapid expansion of Managed Private 5G Network Solutions for Enterprises, particularly within the manufacturing and industrial sectors. As organizations aim to utilize low-latency connectivity for Industry 4.0 applications, such as IoT sensors and autonomous robotics, they are increasingly outsourcing the complex deployment and maintenance of these private cellular networks to specialized third-party providers. This approach allows enterprises to overcome technical challenges like network slicing and spectrum management while securing carrier-grade reliability without maintaining extensive in-house telecom expertise. The scale of this shift is notable; the Global mobile Suppliers Association (GSA) reported in its 'Private Mobile Networks Market Update' in December 2024 that the number of unique customer references for global private mobile network deployments reached 1,603 in the third quarter of 2024.

Concurrently, there is a decisive implementation of Zero-Trust Security Architectures in managed offerings as traditional perimeter-based defense models become less effective in hybrid work environments. Managed Service Providers (MSPs) are integrating identity-centric security frameworks that validate every access request, transitioning from simple VPNs to comprehensive Secure Access Service Edge (SASE) solutions. This shift addresses the expanding attack surface caused by distributed cloud applications and remote users, compelling providers to embed rigorous verification protocols directly into their managed connectivity suites. The urgency of this transition is highlighted by Zscaler's 'State of Zero Trust' report from January 2025, which found that 81% of surveyed organizations are adopting zero trust as the foundation of their cybersecurity strategies, necessitating a realignment of managed service portfolios.

Key Market Players

Cisco Systems, Inc.

Huawei Technologies Co., Ltd.

IBM Corporation

Telefonaktiebolaget LM Ericsson

Verizon Communications Inc.

AT&T Inc.

NTT DATA Corporation

Nokia Corporation

Tech Mahindra Limited

Fujitsu Limited

Report Scope

In this report, the Global Telecom Managed Services Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Telecom Managed Services Market, By Service Type

Managed Data Center

Managed Network Services

Managed Data & Information Services

Managed Mobility Services

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Managed Communications Services and Managed Security Services

Telecom Managed Services Market, By Deployment Mode

Cloud vs On-Premises

Telecom Managed Services Market, By Organization Size

Small and Medium Enterprises and Large Enterprises

Telecom Managed Services Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

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Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Telecom Managed Services Market.

Available Customizations:

Global Telecom Managed Services Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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