

# **Managed Hybrid Infrastructure Services Market - Global Industry Size, Share, Trends, Opportunity and Forecast, Segmented By Service Type (Managed Storage as a Service, Managed Compute as a Service, Managed Disaster Recovery as a Service, Managed Colocation, Managed Network as a Service, Managed Hosting & Others), By Service Deployment (On Premise & Cloud), By Organization Size (Large Enterprise & Small & Medium Enterprises), By End Use Vertical (BFSI, IT & Telecom, Retail, Government & Defense, Manufacturing & Others)By Region & Competition, 2021-2031F**

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## **Abstracts**

The Global Managed Hybrid Infrastructure Services Market is projected to grow significantly from USD 6.89 Billion in 2025 to USD 11.87 Billion by 2031, achieving a 9.49% CAGR. These services involve the outsourced administration and optimization of integrated IT environments spanning physical data centers, private clouds, and public cloud platforms. The market expands as enterprises aim to convert capital expenditures into predictable operating costs and secure the agility to scale resources for fluctuating demand. Furthermore, the inherent technical complexity of maintaining these mixed ecosystems compels organizations to seek specialized external expertise, ensuring continuous system availability as a structural necessity distinct from transient technology trends. However, the sector faces a significant challenge in interoperability barriers, where integrating legacy systems with modern cloud architectures often

creates security vulnerabilities. Managing compliance across fragmented environments also deters potential adopters lacking internal proficiency. This reliance is substantial, with the global managed services market projected at around \$500 billion and growing at 11% to 14% annually in 2025, underscoring the critical role these services play in modernizing enterprise operations despite integration hurdles.

## **Market Driver**

A primary catalyst for the adoption of managed hybrid infrastructure services is the widening global shortage of specialized in-house IT expertise. As enterprises integrate advanced technologies such as generative AI and edge computing into their hybrid architectures, the demand for niche skills has outpaced the available talent pool, forcing organizations to partner with managed service providers (MSPs) to bridge this gap. This deficit is particularly acute in high-growth areas, with 98% of organizations citing difficulties in scaling GenAI initiatives due to a lack of skilled personnel in 2025, according to Nutanix. Concurrently, the increasing complexity of managing hybrid and multi-cloud environments drives market expansion as firms seek to mitigate operational fragmentation. The intricate requirement to synchronize disparate platforms while maintaining security and performance standards has made self-management untenable for many businesses. This challenge directly translates into commercial demand, as nearly six in ten respondents identified technology's growing complexity as the number one factor driving positive demand for channel expertise in 2025, according to the Global Technology Industry Association. This operational burden is further amplified by financial risks, with the global average cost of a data breach reaching \$4.44 million in 2025, according to IBM, reinforcing the necessity for professional oversight.

## **Market Challenge**

The integration of legacy infrastructure with contemporary cloud platforms presents a formidable barrier to the expansion of the managed hybrid infrastructure services market. As organizations attempt to bridge on-premise hardware with scalable cloud resources, technical dissonance between disparate systems frequently results in critical security gaps. These interoperability issues create a fragmented operational landscape where data visibility is compromised, making it difficult for service providers to guarantee the unified security posture that enterprise clients demand. Consequently, businesses hesitate to fully outsource their hybrid environments, fearing that external vendors cannot sufficiently mitigate the risks associated with these complex, non-standardized interfaces. This fragmentation directly impacts market momentum by increasing the perceived risk of compliance failures. When data resides in siloed

environments, maintaining a cohesive audit trail becomes exponentially harder. In 2025, over 54% of organizations utilized four or more distinct tools to manage data risks, according to the Cloud Security Alliance, creating information conflicts that hinder effective decision-making. This operational disconnect forces organizations to retain internal control rather than trusting managed services, thereby stifling the potential revenue growth of the broader hybrid infrastructure sector.

## **Market Trends**

The mainstream adoption of Financial Operations (FinOps) services is fundamentally reshaping how enterprises govern their hybrid estates, shifting the focus from simple cost monitoring to active value optimization. As organizations scale distributed workloads, the lack of visibility into variable cloud expenditures has necessitated a cultural shift where engineering, finance, and business teams collaborate to ensure fiscal accountability. This trend is particularly accelerated by the high computational costs of artificial intelligence workloads, which require precise governance to prevent budget overruns in hybrid environments. According to the FinOps Foundation's 'State of FinOps 2025' report, 63% of organizations now actively manage their AI spending, more than doubling from the previous year, indicating that financial rigor is becoming a non-negotiable component of managed infrastructure contracts. Simultaneously, the implementation of GreenOps and sustainability-focused service offerings is gaining traction as a critical market requirement driven by regulatory mandates and corporate social responsibility goals. Managed service providers are increasingly tasked with not only optimizing performance but also quantifying and reducing the environmental impact of hybrid architectures, which encompass both energy-intensive on-premise data centers and public cloud resources. This focus involves deploying sophisticated telemetry to track energy consumption and carbon emissions across the IT lifecycle, enabling clients to meet stringent reporting standards. As per Flexera's '2025 State of the Cloud Report', 36% of organizations are already tracking their cloud carbon footprint, reflecting a significant move towards environmentally conscious infrastructure management. Consequently, providers are standardizing sustainability metrics within their service level agreements to differentiate themselves in a competitive landscape.

## **Key Market Players**

IBM Corporation

Hewlett Packard Enterprise (HPE)

Dell Technologies Inc.

Cisco Systems, Inc.

Accenture plc

Capgemini SE

Wipro Limited

Infosys Limited

Fujitsu Limited

NTT Ltd.

## Report Scope

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

### Managed Hybrid Infrastructure Services Market, By Service Type

Managed Storage as a Service

Managed Compute as a Service

Managed Disaster Recovery as a Service

Managed Colocation

Managed Network as a Service

Managed Hosting

Others

## Managed Hybrid Infrastructure Services Market, By Service Deployment

On Premise

Cloud

## Managed Hybrid Infrastructure Services Market, By Organization Size

Large Enterprise

Small & Medium Enterprises

## Managed Hybrid Infrastructure Services Market, By End Use Vertical

BFSI

IT & Telecom

Retail

Government & Defense

Manufacturing

Others

## Managed Hybrid Infrastructure Services Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## **Competitive Landscape**

*Managed Hybrid Infrastructure Services Market - Global Industry Size, Share, Trends, Opportunity and Forecast,...*

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

**Available Customizations:**

Global Managed Hybrid Infrastructure 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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