

Global Managed Mobility Services - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Global Managed Mobility Services Market size is estimated at USD 6.07 billion in 2024, and is expected to reach USD 18.81 billion by 2029, growing at a CAGR of 25.41% during the forecast period (2024-2029).

Key Highlights

- The managed mobility service providers offer solutions that ease the burden on enterprise IT departments by dealing with complex managing of various device platforms, with the help of interpreted content for specialized mobile applications. Therefore, managed mobility services enable easy communication with mobile office workers by connecting them with management, servers, and databases. Thus, it allows enterprises to overcome the traditional communications that involve PC only for business emails, databases, and other corporate content.
- Furthermore, mobility as a service solution simplifies corporate personnel's complex mobile device technology needs by offering a single partner to manage the whole mobile device lifecycle. Thus, these companies take the hassle of managing mobile technology so that IT teams can save resources and time to focus on the strategic initiatives that are helping them to transform their businesses.
- The growing shift of mature organizations toward digital connectivity drives at least 50% of employees to use more than one device for work that demands centralized management. Thus, the rise of new types of carrier devices continues to flood workplaces and expand the mobility ecosystem, driving the need for experienced MMS providers to handle the complexity of communication across organizations.
- The use of mobile devices among doctors, nurses, patients, and other supporting staff has increased worldwide. Moreover, organizations in the healthcare end-user industry must adhere to HIPAA regulations for data sharing and storage. These factors are expected to drive the adoption of managed mobility services in the healthcare industry.
- Customers are still witnessing challenges for cost visibility as they invest in the third-party managed mobility service. Some

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vendors lack the expertise to estimate the total costs or the capacity or resources in order to add individual parameters to arrive at an estimated cost manually. Such challenges add a drawback to the market.

-Overall, the impact of COVID-19 on the global managed mobility services market has been mixed. While the pandemic has increased demand for MMS services due to the shift toward remote work, it has also caused disruptions to supply chains and economic uncertainties, leading to a decrease in investment in some cases. However, the pandemic has also accelerated technological advancements in the global MMS market, leading to new and innovative solutions. The market for MMS services is expected to grow in the long term as companies look for ways to increase efficiency and adapt to changing business environments.

Managed Mobility Services Market Trends

IT and Telecom End-user Industry Segment Holds Significant Market Share

- The IT and telecom sector is a significant market for managed services. Due to the high rate of various technological adoptions, the enterprise mobility trend has emerged over the years. Today, companies primarily focus on business strategies and core competencies, fueling the utilization and adoption of bring-your-own-device (BYOD). This increases the requirement for streamlined mobility services, likely to boost the demand for managing these mobile devices.

- Furthermore, the growing mobile subscriber base in emerging countries, such as China, India, and Brazil, has been propelling the adoption of BYOD policies, enhancing work efficiency and flexibility in operations. According to a Cisco report, enterprises with a BYOD policy save, on average, USD 350 per year per employee. Moreover, reactive programs can boost these savings to USD 1,300 per year per employee.

- The demand for managed cloud services has increased across the globe due to government regulations and lockdown measures due to the COVID-19 pandemic, further boosting the managed mobility services and forcing businesses to move towards remote working modes, which has led companies to adopt cloud-based solutions to expand their requirements.

- Cybersecurity compliance requirements mandated by the state and local governments and regulatory bodies also drive the need for managed mobility application services to be security-focused. Additionally, as dedicated, on-premise hardware for computing purposes will decrease, and most of the functionality will become cloud-based, privacy and security issues will become more intense.

- Adopting IoT solutions in managed mobility services, which connect hardware devices, embedded software, and communication services, offers smart communication environments, smart transportation, smart homes, and smart healthcare and is expected to drive the market during the forecast period.

North America to Hold Major Share over the Forecast Period

- According to the annual internet report by Cisco, the average number of devices and connections per capita worldwide is anticipated to increase to 3.6 by the end of the year 2023. Among the countries with the highest average per capita devices and connections by 2023, the United States is expected to remain at the top with an average of 13.6 devices and connections per capita, followed by South Korea and Japan.

- Moreover, the 5G penetration in the country also encourages the demand for IoT devices in the future. The focus on deploying 5G by national mobile operators, like AT&T, Sprint, T mobile, and Verizon, has led to significant developments over the years. According to the GSMA, 5G will reach 100 million mobile connections in early 2023 and become the country's leading mobile network technology by 2025, with more than 190 million 5G connections.

- Cloud and digital transformation have increased the total cost of a data breach. The use of mobile platforms, extensive cloud

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migration, and IoT devices are the drivers increasing the cost. According to the Ponemon Institute's "Cost of Data Breach Study," the global average for a data breach was USD 3.83 million. However, the average data breach cost in the United States was significantly high at USD 8.64 million. The high potential of data breaches is expected to drive the managed mobile services market as enterprises focus more on IT security.

- The Canadian managed mobility services market is witnessing increased investments further driven by the COVID-19 pandemic-induced work culture. For instance, in September 2021, MSP Corp Investments Inc. raised USD 35 million in growth capital to acquire and invest in managed IT services providers (MSPs) across Canada. Major financial backers include CIBC and BDC Capital's Growth Equity Partners - Fund II. The company partners and acquires high-performing MSPs in the country to deliver technology, resources, and business support to empower MSP teams. Key areas of focus of the company include managed network services, mobility management, cybersecurity, and cloud hosting.

- The digital trends brought globally by the Industry 4.0 initiatives also drive the need for industrial IoT. For instance, in May 2021, Toronto-based BehrTech, a startup, was awarded for its wireless connectivity products for the IoT that the company developed in 2020, and the company also received a USD 3 million grant from a joint funding program between the federal government and a non-profit organization to build an Industry 4.0 lab.

Managed Mobility Services Industry Overview

The managed mobility services market is fragmented, with the presence of major players like AT&T Intellectual Property, Fujitsu, Kyndryl Inc., Wipro, and Orange SA. Players in the market are adopting strategies such as partnerships, agreements, innovations, and acquisitions to enhance their service offerings and gain sustainable competitive advantage.

- February 2023: Kyndryland Nokia expanded its global network and edge computing alliance. The three-year agreement extends plans to collaborate on and accelerate the deployment of flexible, dependable, and secure LTE and 5G private wireless connectivity services, as well as Industry 4.0 solutions. Furthermore, Kyndryl increases its strategic investment in Nokia by achieving the highest tier Nokia Digital Automation Cloud (DAC) accreditation status, increasing expert resources and skilled practitioners ready to support customers worldwide. Kyndryland Nokia opened a partner innovation lab in Raleigh, North Carolina. The lab will integrate advanced wireless connectivity and edge computing with a multi-factor zero trust model, converging IT and OT for enterprises.

- March 2023: Wipro officially launched its "5G Def-I" platform. The integrated platform, which enables businesses in the mobility market to transform their infrastructure, networks, and services seamlessly, debuted at the MWC Barcelona panel, realizing the connected enterprise's goals. Wipro's 5G Def-I platform, built on open standards, offers the cloud-native environment, network APIs, and third-party integrations required for businesses to onboard existing infrastructure, incubate new apps and services, and keep up with technological changes. The integrated suite combines cloud scalability with 5G speed and capacity. It also includes an intelligence layer for creating actionable business insights. It also includes visibility into endpoint devices and data insights, faster service implementation for network operators, and rapid deployment of new enterprise applications.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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