

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

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Report description:

The Qatar Managed Services Market size is estimated at USD 0.59 billion in 2024, and is expected to reach USD 1.14 billion by 2029, growing at a CAGR of 13.95% during the forecast period (2024-2029).

The rapid adoption of cloud-based solutions by enterprises, increasing investment in information technology, and growing adoption of Bring Your Own Device (BYOD) culture are expected to create ample opportunities for major vendors in Qatar.

Key Highlights

- Managed services refer to a concept wherein a third-party service provider contains an organization's in-house day-to-day management functions. Managed services primarily involve outsourcing infrastructure, printing, security, mobility, and other processes, though the ownership rights stay with the end-user. It is estimated that successful managed services deployment will help reduce IT cost by 25%-45% and increase operational efficiency by 45-65%. Managed services offer various benefits proven to positively impact the organization's development that adopts such services as they can focus on their core expertise.
- Small and medium-sized enterprises (SMEs) are expected to be the driving factors positively impacting the market growth, as more SMEs are looking to outsource non-core activities. SMEs are paramount to Qatar's National Vision 2030, which has set several strategic goals, including building a well-diversified economy. According to Fatora.io, an incubated startup operating within Qatar Science and Technology Park's (QSTP), part of Qatar Foundation Research, Development, and Innovation, more than 96% of the 25,000 businesses in the private sector registered are classified as SMEs.
- The market for managed services is expected to witness a high demand for managed security and infrastructure services, finance and technology, and IT services. There has been a tremendous shift toward managed services and applications for short and long-term company goals. As managed services enable companies to access enhanced applications and services, it primarily helps them target their core strategic areas while outsourcing the rest of the operations to the service providers with operational

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expertise in that domain.

-The outbreak of the COVID-19 pandemic has increased the demand for managed security services in the end user verticals. There has been a sharp rise in the various industry's cyberattacks during the COVID-19 global pandemic, particularly attacks using ransomware, business email compromise (BEC), and socially engineered spear-phishing.

-Therefore, the government has released a Zero-trust Model, a holistic approach setup for cybersecurity involving several processes and technologies through which access to all resources is authenticated and verified. Moreover, Qatar Computing Research Institute (QCRI) built a tool that uses enterprise data logs to determine dormant attackers and amplify low attack signals within the network of enterprises. Such research and development enables partnership opportunities for the managed service providers in the market and enhances the need for outsourcing managed services.

Qatar Managed Services Market Trends

Managed Cloud Services is Expected to Drive the Market

- Managed cloud services primarily provide partial or complete cloud management for the public environments and Hybrid IT. Managed cloud service providers (MCSP) have been offering significant value, taking care of the crucial aspects of the cloud. These responsibilities may include migration, security, optimization, configuration, and optimization. Significant advantages of these MCSPs are resource optimization, cloud integration, and flat, predictable spending.

- The managed cloud services may encompass various IT tasks, including engineering on-demand, operations management, 24/7 help desk support, and hosting and implementation. By offloading these crucial tasks to a managed service provider, organizations can free up their internal IT teams to focus on more complex initiatives and efforts that may drive new business outcomes.

- Moreover, the increasing cloud adoption across multiple industries has significantly boosted cloud service providers. Reliance on these service providers is mainly driven by the organizations' inability to manage all the crucial cloud-related tasks in-house. This has eventually led to the managed cloud services trend in the country. The cloud-managed services offer organizations comprehensive cloud management support by handing over the complete responsibility of the cloud operations to these MSPs.

- Furthermore, organizations, tiny and medium enterprises (SMEs), have embraced cloud solutions due to their significant advantages. Qatar has been among the top adopters of cloud solutions in the Middle-East region. Cloud adoption is expected to rise substantially in the next few years.

- Additionally, the cloud offers several service models depending on the business needs, which include Infrastructure as a Service, Platform as a Service, and Software as a Service. The key characteristics of the cloud are that it is significantly secure, on-demand, offers access to networks everywhere, has rapid elasticity, along is a metered service.

Government Sector is Expected to Hold the Majority Share

- The government agencies working in the country primarily handle multiple responsibilities that include attending to their constituents' needs while also ensuring that the community infrastructure and services are working optimally. The rising technological advancements have made the technology even more essential for the government to function properly and seamlessly.

- Working with a managed service provider can take the routine IT maintenance and management tasks off the shoulders of these government agencies, enabling them to focus better on core government matters. Managed services have been an affordable way to ensure that the data centers, network, telecommunications, and cloud resources are operating securely and reliably and that the government technology stays as per the current trends.

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- Moreover, just managing technology is not the government's core concern; the agencies also need technology to serve their constituents. Technology is increasingly making various government services accessible to the citizens; however, it has also exposed crucial information to multiple types of risks. Managing these risks has increasingly become complicated by the fact that these government agencies work with a tight and fluctuating budget. Therefore, managed service providers can help these agencies optimize their technology and protect sensitive information while staying within their budget.
- Increasing investments in innovative city projects are also anticipated to provide scope for managed service providers. The increase in smart cities increases the percentage of the connected environment. The government could increase its focus on managed services to maintain properly connected infrastructure.
- Further, Microsoft Qatar announced that, along with a global consortium of partners that Ooredoo led, it joined the Ministry of Transportation and Communications to bring to life the TASMU Platform, a one-of-a-kind smart city solution.

Qatar Managed Services Industry Overview

Qatar managed services market is competitive due to the presence of a few major players like MEEZA QSTP LLC, Gulf Business Machines Qatar W.L.L., Diyar Group, Paramount Computer Systems FZ-LLC, and Ooredoo Q.P.S.C. These major players, with a prominent share in the market, are focusing on expanding their customer base across foreign countries. These companies leverage strategic collaborative initiatives to increase their market share and profitability. However, with technological advancements and product innovations, mid-size to smaller companies are growing their market presence by securing new contracts and tapping new markets.

- May 2022- Microsoft Qatar, received the National Information Assurance Certification from the National Cyber Security Agency, demonstrating Microsoft cloud's compliance with the Information Security Management System (ISMS) standards in its efforts to support the uptake of secure cloud and quicken the nation's digital transformation agenda.
- November 2022 - Protera launched the Automated Disaster Recovery Framework in an effort to assist contemporary enterprises in making the shift from static, "check-box" disaster recovery (DR) plans to more dynamic, practical testing procedures. The disaster recovery (DR) solution gives businesses the ability to repeatedly test, validate, and demonstrate that their procedures can swiftly and effectively restore operations with little disruption to business operations in the event of a cyberattack.

Additional Benefits:

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

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