

GCC Managed Services - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The GCC Managed Services Market size is estimated at USD 11.35 billion in 2025, and is expected to reach USD 17.44 billion by 2030, at a CAGR of 8.96% during the forecast period (2025-2030).

Key Highlights

- The GCC region of the Middle East has been viewed as a region that lags in IT spending. However, the scenario changes, considering the government, large organizations, small-to-medium enterprises (SMEs), as well as start-ups across all industries in the region are slowly realizing the need to transform digitally.
- Utilizing cutting-edge technologies like artificial intelligence (AI), cloud computing, and others will eventually enable firms to meet various functional business requirements while promoting business process improvement. Managed services offer efficient features at low rates without sacrificing quality. In addition, they worked in-service support and guaranteed the consistency and dependability of services provided for various business operations.
- In a recent study by Microsoft, two in three Gulf enterprises reported that they were planning to invest at least 5% of their annual revenue in digitizing their operations. Further, up to 51% of organizations reported having prioritized cloud computing, business intelligence (41%), the Internet of Things (37%), and Artificial Intelligence (29%). Therefore, the region, which is expected to register a significant growth rate in IT upgrades, is expected to provide a greater demand for managed services.
- Further, the GCC region has also been the target of cyberattacks since The facts presented by FireEye, a prominent cybersecurity vendor, clearly indicate that cloud security will become a trend in the region over the next few years. For instance, FireEye mentioned that Saudi Arabia witnessed more than 1,640,000 online attacks daily. Considering the progress of the area in the direction of artificial intelligence and IT experience (Vision 2030) and their dependency on the cloud, cloud security might flare up in the region over the forecast period.
- The managed services market's expansion is anticipated to be constrained throughout the forecast period by a pervasive lack of

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expertise and experience in integrating new technologies and putting managed services in place. The market's expansion is anticipated to be constrained by additional issues, including doubts about the effectiveness of managed services models, worries about data security and privacy protection, and the requirement for qualified personnel.

- While outsourcing is an appropriate option to keep IT infrastructure up and running, it faces considerable opposition from management teams who fear the loss of jobs. In addition, many companies are skeptical about losing control of their IT infrastructure and are concerned about the security of their data, which is another obstacle to outsourcing their IT needs to managed service providers MSPs.

GCC Managed Services Market Trends

Managed Hosting Services expected to grow significantly over the forecast period

- The client needs to be managed to host services to lower costs for IT infrastructure, increase security, and maintain ownership rights to data. One significant trend in the managed hosting market is the increasing use of virtualized technology, which is predicted to persist over the forecast period. Managed hosting services help virtualization by making the virtualized environment less expensive and less complicated.

- Hosting service providers linked to hardware makers and cloud providers have provided clients with exclusive services. These data centers are adaptable and may be used for everything from straightforward data warehousing to data analytics. These exceptional features make hosting manageable while lowering costs, which is anticipated to benefit the global GCC managed services market throughout the forecast period.

- The growth of the data center market in the GCC countries is being driven by both government-led infrastructure growth and the fact that more and more businesses are moving their operational applications to the cloud.

- Considering the GCC enterprises' limited IT budget and the lack of in-house capabilities to keep abreast with the evolving technologies, the region's dependency on Data Center service providers can be rated as high.

- Cloud service providers, including Microsoft, Google, and AWS, have been making significant regional investments and have expanded their footprints. According to AWS, which opened three data centers in Bahrain, the region has been the most requested by its global partners. With the new data centers, enterprises in the region can move to a cloud system hosted by a specialist company, which will be cheaper than building their own infrastructure of servers, hardware, and security networks.

UAE Expected to Record Fastest Growth

- The region houses local players such as Mindfire Technologies Inc., Injazat Group, ASPGulf, Unified Microsystems, and Emitac Corporate, which drive intelligent transformation for enterprises across the UAE.

- Further, in partnership with telecom players, cloud and other technology players such as Microsoft, Ericsson, and Cisco are looking to transform businesses in the region digitally. With increased awareness of these technologies, the region is expected to increase its spending on upgrading its IT infrastructure, thus increasing the scope for managed service providers in the region.

- The region has evidently developed and extended strategic partnerships to enable managed services. For instance, in November 2022, Tata Communications International Pte Ltd. announced that it has extended its partnership with the United Arab Emirates system integrator (SI) Intertec Systems to offer managed services in the region. In that partnership, in order to enhance the cyber defense of enterprises in the region, a Cyber Security Operation Center (SOC) and managed security services were established by an Indian subsidiary of India's Tata Communications.

- According to Sonicwall, in 2022, organizations in the United States saw around 2.68 billion malware attacks, ranking first among selected countries worldwide, where the United Arab Emirates held sixth position with 71.1 million malware attacks.

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- Moreover, in the UAE and Saudi Arabia, 74% of organizations are worried about brand abuse, according to a Gulf Business article. However, according to a different Gulf News report, a Domain-based Message Authentication, Reporting & Conformance (DMARC) record is in place for 69% of the Forbes "Top 100 Middle East Companies." This indicates that email fraud is a possibility for about 31% of these businesses. Such attacks further drive the use of managed services in the region.

GCC Managed Services Industry Overview

The GCC Managed Services market comprises a significant share of homegrown companies and international companies such as HP, IBM, and Wipro, among others. The region also has small, managed service providers who are part of large companies' partner programs, such as Cisco. Some of the recent developments in the market are:

In September 2022, Cisco and Wipro collaborated and created a hybrid cloud solution that is agile, programmable, and adaptive by combining the edge, private, and public clouds. The full-stack IT-as-a-service platform will use technologies from Cisco's Full Stack Observability solution, such as AppDynamics, ThousandEyes, Cisco Workload Optimization Manager (CWOM), Intersight, and Secure Application.

In February 2022, Nokia was to introduce two new managed service offerings by utilizing the intelligence from their network data to assist communication service providers (CSPs) in providing a better customer experience and realizing faster returns on their 5G investments.

Additional Benefits:

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

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