



An Analysys Mason company



# New research programme: Managed Service Provider Strategies



# Programme overview: our research helps MSPs, their competitors and their suppliers to understand the market for managed IT services

## The importance of MSPs

We define managed service providers (MSPs) as companies that generate at least 40% of their revenue from managed services, such as storage, security, networking, PBX and servers.

The role of MSPs is increasing. We forecast that globally, **SME spend on services offered by MSPs will grow from USD56 billion in 2016 to USD105 billion in 2021 (13.4% CAGR).**

Two major reasons explain this growth in spend with MSPs.

- SMEs are increasingly looking to outsource complex IT requirements to trusted, experienced partners.
- Many channel partners are switching to an MSP model to develop recurring relationships with customers, instead of just selling one-time projects.

## Core value of the programme

The MSP Strategies research programme is designed to help:




- MSPs
- telecoms operators selling managed IT services
- suppliers to MSPs (including telecoms operators, software vendors and distributors).

## Programme overview

- Provides detailed market forecasts for spend with MSPs
- Helps MSPs and their competitors understand best practice and trends in **portfolio design, supporting tools and go-to-market approaches**
- Allows MSPs to **benchmark their performance**
- **Helps suppliers to MSPs make the most effective use of this channel**

All our research is supported by a survey of almost 950 MSPs. **We believe that this is the largest primary research survey of MSPs.**

# Programme content: the MSP Strategies programme includes forecasts, surveys and market commentary

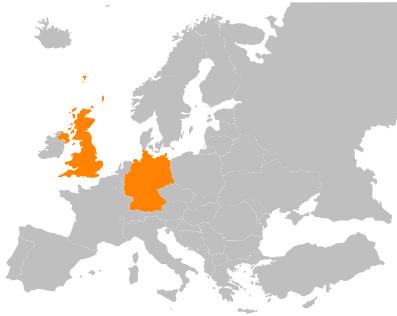
	Areas covered	Example reports
<b>Forecasts</b> 	<p>Forecast for the key product areas sold by managed service providers, such as cloud, security and telecoms</p>	<ul style="list-style-type: none"> <li>▪ Regional forecasts:                             <ul style="list-style-type: none"> <li>- Western Europe 2018-2023</li> <li>- Developed Asia 2018-2023</li> </ul> </li> <li>▪ Global forecast summary: 2018-2023</li> </ul>
<b>Surveys</b> 	<ul style="list-style-type: none"> <li>▪ Survey of almost 1000 MSPs across nine countries and five continents</li> <li>▪ Insight into all aspects of MSPs</li> </ul>	<ul style="list-style-type: none"> <li>▪ MSP current and planned product portfolios</li> <li>▪ Structure and priorities of MSPs</li> <li>▪ MSP current and planned key vendors</li> <li>▪ MSP current and planned tools</li> </ul>
<b>Strategy reports and commentary</b> 	<ul style="list-style-type: none"> <li>▪ Survey of almost 1000 MSPs across nine countries and five continents</li> <li>▪ Insight into all aspects of MSPs</li> </ul>	<ul style="list-style-type: none"> <li>▪ Revenue trends for MSPs</li> <li>▪ Customer satisfaction for MSPs</li> <li>▪ Differentiators for MSPs</li> </ul>

# Forecast: the programme includes a detailed forecast of the opportunities in the MSP market

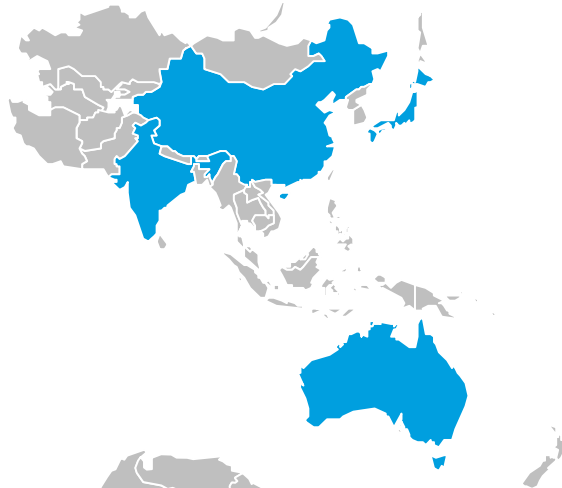
REPORT COVERAGE		
Geographical	Services	
<p><b>Regions modelled:</b></p> <ul style="list-style-type: none"> <li>▪ Western Europe</li> <li>▪ Central and Eastern Europe</li> <li>▪ North America</li> <li>▪ Middle East</li> <li>▪ Emerging Asia</li> <li>▪ Developed Asia</li> </ul>	<p><b>Telecoms services:</b></p> <ul style="list-style-type: none"> <li>▪ Fixed connectivity</li> <li>▪ Mobile connectivity</li> <li>▪ IoT connectivity</li> </ul> <p><b>Cloud services</b></p> <ul style="list-style-type: none"> <li>▪ Infrastructure-as-a-services</li> <li>▪ Platform-as-a-service</li> </ul>	<p><b>Security</b></p> <ul style="list-style-type: none"> <li>▪ Endpoint security</li> <li>▪ Network security</li> </ul> <p><b>IT services</b></p> <ul style="list-style-type: none"> <li>▪ Product support</li> <li>▪ Professional services</li> </ul>
<p><b>Enterprise size</b></p> <p><b>Segments:</b></p> <ul style="list-style-type: none"> <li>▪ Micro (0–9 employees)</li> <li>▪ Small (10–49)</li> <li>▪ Medium (50–249)</li> <li>▪ Large (more than 249 employees)</li> </ul>	<p><b>Software</b></p> <ul style="list-style-type: none"> <li>▪ On premise/licensed</li> <li>▪ Software-as-a-service</li> </ul>	

## Survey: we have interviewed 950 managed service providers in 9 countries to understand how the market is evolving

### Europe



### Asia



### North and Central America



### South America

### Question topics

**Product portfolio:** The current and planned future product portfolio of MSPs

**Tools and platforms used:** Approach to hosting, data centres and tools used (for example for remote monitoring and professional services automation); monthly spend on these tools

**Structure and priorities:** Spend by activity (for example, sales and marketing)

**Vendor partnerships:** Key current vendors and future plans; evaluation of different partners

**Sales and marketing:** Sales and marketing budgets; ROI from marketing activities such as email campaigns and direct mail campaigns

**Hosting models and platforms:** Hosting model preferred and the reasons for choosing private/public/hybrid cloud; monthly spend on hosting platforms

**Business model and strategies:** Pricing models; margins; key challenges faced; cost drivers affecting MSPs

# Commentary: the programme will explore how the MSP portfolio is evolving and how to deliver these services

## Developments in services sold by MSPs



Products covered include:

- Telecoms services
- Software
- Security
- Professional services and consulting
- IT support

## Developments in hosting and cloud services



- Benefits and disadvantages of using one's own data centre, third-party data centres and public cloud infrastructure
- Hosting providers by type of MSP and end users
- Trends in hosting and cloud services

## Developments in tools used to deliver cloud services



- Remote monitoring and management
- Professional services Automation
- Configuration tools
- Application management tools
- Billing and provisioning tools
- Ticketing and servicing tools

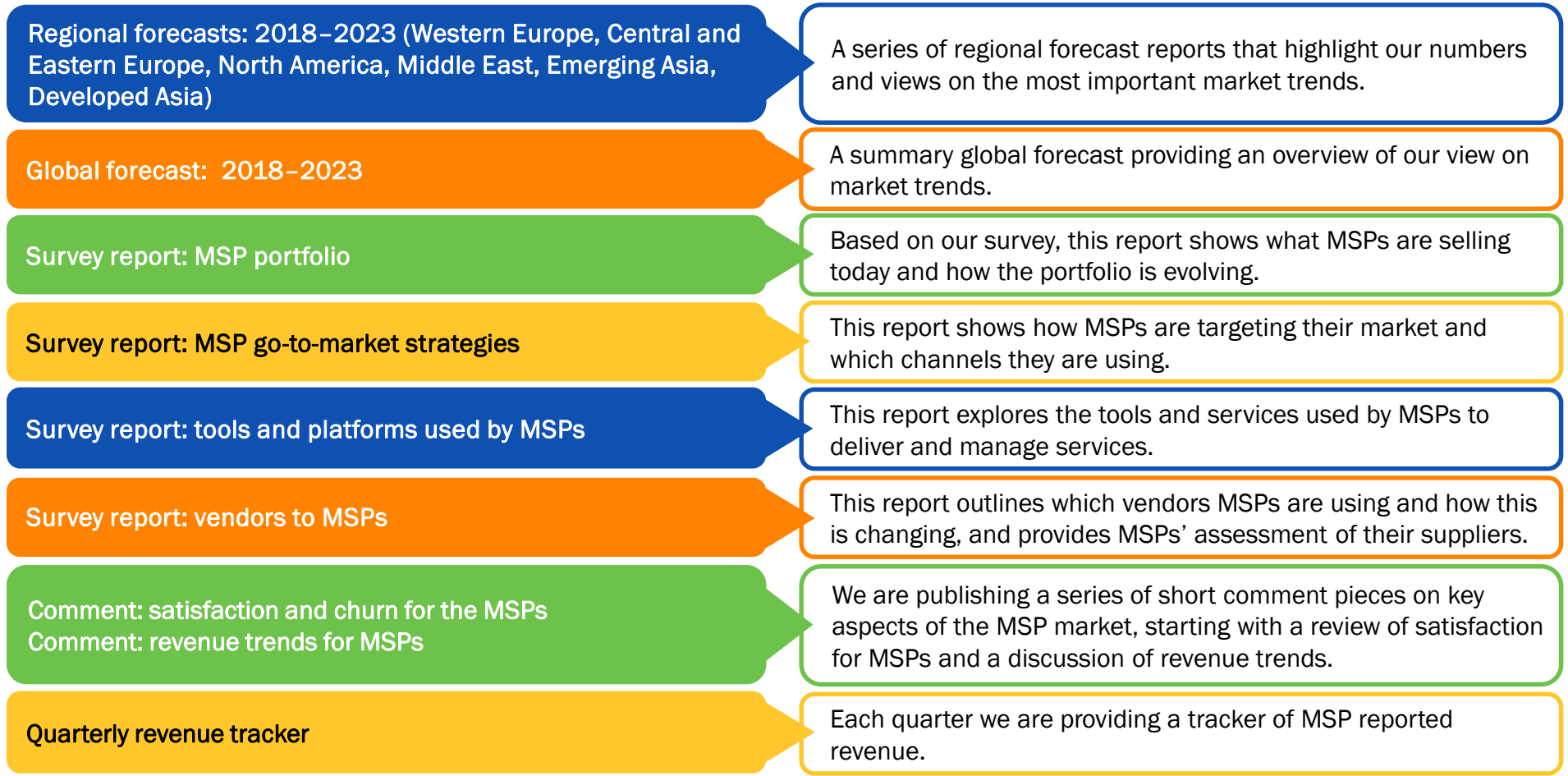
## MSP partners



- Use of technology vendors and distributors to provide the solutions
- Use of indirect channels to sell solutions
- MSP evaluations of vendors and distributors

# The MSP programme has a mix of forecast reports, survey reports, commentary and market trackers

## Forthcoming reports in the MSP programme



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## About AMI-Partners



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**AMI-Partners is a global ICT research and consulting firm that focuses on the small and medium business (SMB) market.**

- AMI-Partners was founded in 1996 and has over 20 years of expertise in the SMB ICT market. It was acquired by Analysys Mason in July 2018.
- Specialisms include:
  - go-to-market opportunity assessment
  - tracking buying behaviour
  - customer segmentation
  - channel partner ecosystem dynamics
  - sales enablement.
- AMI-Partners has invested over USD50million in primary SMB research to date, thereby setting a global benchmark.

### The Analysys Mason ICT Global Model



75 million+ data points



**130+** ICT business categories



**52** Countries and  
**5** 'rest-of-region' areas



**19** Industry verticals



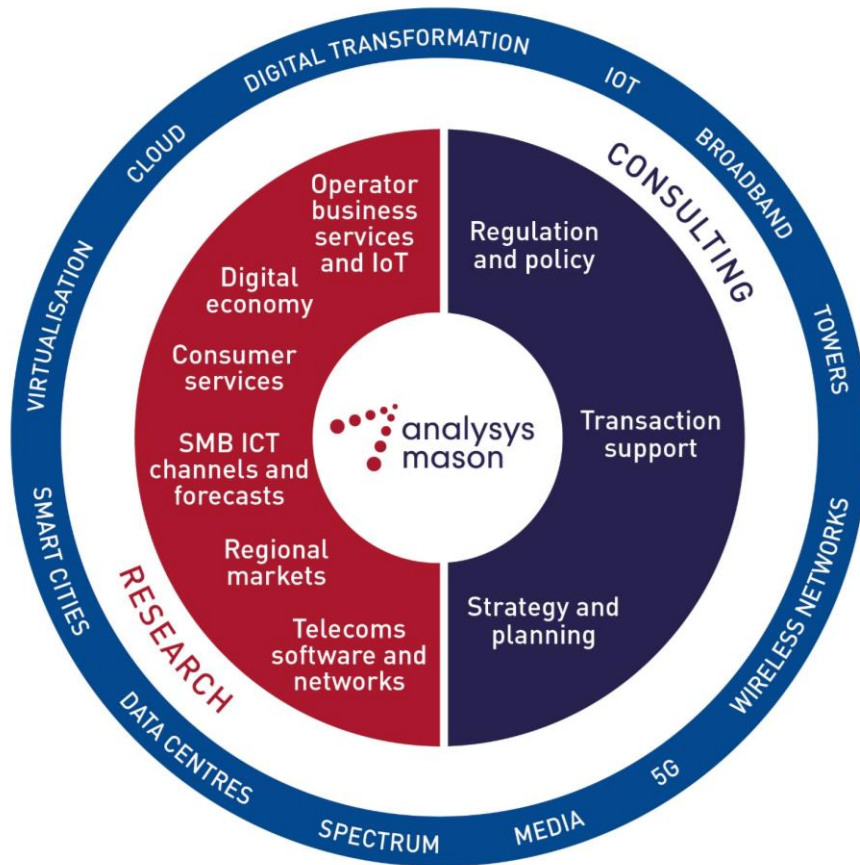
**13** Business sizes



**8** Routes to market

# Analysys Mason's consulting and research are uniquely positioned

## Analysys Mason's consulting services and research portfolio



### Consulting

We deliver tangible benefits to clients across the telecoms industry:

- communications and digital service providers, vendors, financial and strategic investors, private equity and infrastructure funds, governments, regulators, broadcasters and service and content providers

Our sector specialists understand the distinct local challenges facing clients, in addition to the wider effects of global forces.

We are future-focused and help clients understand the challenges and opportunities new technology brings.

### Research

Our dedicated team of analysts track and forecast the different services accessed by consumers and enterprises.

We offer detailed insight into the software, infrastructure and technology delivering those services.

Clients benefit from regular and timely intelligence, and direct access to analysts.



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