

# **Global Open Radio Access Network (Open RAN) Market Size Study & Forecast, by Deployment, Network, Component, Frequency, and Regional Forecasts 2025-2035**

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## **Abstracts**

The Global Open Radio Access Network (Open RAN) Market is valued at approximately USD 1.94 billion in 2024 and is anticipated to expand at a CAGR of 16.00% over the forecast period from 2025 to 2035. Open RAN has emerged as a disruptive framework designed to disaggregate proprietary RAN architectures, thereby enabling multi-vendor interoperability, cost efficiency, and accelerated innovation across telecom networks. By decoupling hardware and software components and fostering openness through standardization, Open RAN is empowering operators to build agile, scalable, and vendor-neutral 5G and 4G infrastructures. As telecom networks pivot toward software-defined architectures, Open RAN is facilitating more flexible and programmable radio access networks that are critical to future-proofing connectivity for smart cities, autonomous vehicles, and Industry 4.0 ecosystems.

The evolution of Open RAN is intrinsically tied to the growing appetite for 5G rollout, especially in regions aggressively investing in next-generation connectivity. Telecom operators are increasingly turning to hybrid and cloud-native deployments—leveraging public, private, and hybrid cloud environments—to enhance network efficiency, reduce latency, and gain centralized control. Key enablers such as mmWave and sub-6 GHz spectrums are gaining traction, allowing network slicing and ultra-low latency features to be more effectively implemented across industrial, enterprise, and consumer applications. Moreover, governmental push for supply chain diversification and open standards—especially across the U.S., Japan, and Europe—has created fertile ground for Open RAN adoption, supported by public-private initiatives and regulatory mandates to move away from single-vendor dependencies.

Regionally, North America is positioned as a dominant player, largely driven by early 5G deployment, extensive R&D investments, and strong collaboration between telecom operators and cloud hyperscalers. The U.S., in particular, is pioneering large-scale Open RAN testing and deployment, backed by federal funding and spectrum auctions. Meanwhile, Asia Pacific is projected to witness the fastest growth over the forecast period, attributed to the rapid digitalization of emerging economies such as India and China, where telecom networks are being revamped to accommodate surging mobile data consumption and rural connectivity targets. In Europe, regulatory support for supply chain diversification and increasing investments in greenfield 5G deployments are significantly accelerating Open RAN penetration across the region.

Major market player included in this report are:

Nokia Corporation

Telefonaktiebolaget LM Ericsson

Samsung Electronics Co., Ltd.

Fujitsu Limited

NEC Corporation

Rakuten Group, Inc.

Intel Corporation

Qualcomm Technologies, Inc.

Mavenir Systems, Inc.

Parallel Wireless, Inc.

Hewlett Packard Enterprise

Cisco Systems, Inc.

Dell Technologies Inc.

Viavi Solutions Inc.

AltioStar Networks Inc.

## Global Open Radio Access Network (Open RAN) Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025-2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Deployment:

Public Cloud

Hybrid Cloud

Private Cloud

By Network:

5G

4G

By Component:

Services

Hardware

Software

By Frequency:

mmWave

Sub-6 GHz

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

#### Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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