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# Telecom Cloud - Company Evaluation Report, 2025

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## Abstracts

The Telecom Cloud Companies Quadrant is a comprehensive industry analysis that provides valuable insights into the global market for Telecom Cloud. This quadrant offers a detailed evaluation of key market players, technological advancements, product innovations, and emerging trends shaping the industry. MarketsandMarkets 360 Quadrants evaluated over 100 companies, of which the Top 17 Telecom Cloud Companies were categorized and recognized as quadrant leaders.

The growing volume of data generated by websites and mobile applications, the increasing emphasis on delivering customer-focused applications to enhance customer satisfaction, and the rising need to manage and reduce Capital Expenditure (CAPEX) and Operational Expenditure (OPEX) are among the key factors driving the adoption of emerging technologies. Technologies such as big data, Artificial Intelligence (AI), and Machine Learning (ML) are gaining momentum, contributing to the global expansion of the telecom cloud market. Key drivers such as enhanced data security, quicker disaster recovery (DR), and compliance with regulatory requirements are fueling the demand for telecom cloud services. Additionally, the need to minimize risks, achieve greater scalability and flexibility for data storage and movement, simplify infrastructure and storage complexities, and boost overall business efficiency is propelling the growth of the telecom cloud market.

Telecom represents a next-generation network architecture that integrates software-defined networking (SDN), network functions virtualization (NFV), and cloud-native technologies into a distributed computing environment. As both network and computing resources are dispersed across various sites and cloud platforms, the use of automation and orchestration becomes essential. This transformation reflects the shift of communication service providers (CSPs) from traditional infrastructure models based on vertically integrated proprietary hardware to digital service providers (DSPs) that leverage cloud-based technologies.

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The 360 Quadrant maps the Telecom Cloud companies based on criteria such as revenue, geographic presence, growth strategies, investments, and sales strategies for the market presence of the Telecom Cloud quadrant. The top criteria for product footprint evaluation included By COMPONENT (Platform, Solutions, Services), By DEPLOYMENT MODEL (Public Cloud, Private Cloud, Hybrid Cloud), By CLOUD SERVICE MODEL (Infrastructure as a Service, Platform as a Service, Software as a Service), and By NFV SOFTWARE (VNFS/CNFS, NFVI).

Key players in the Telecom Cloud market include major global corporations and specialized innovators such as Google, Microsoft, AWS, IBM, Broadcom, Oracle, Intellias, Nokia, Ericsson, Huawei, ZTE, Juniper, Cisco, Amdocs, Virtusa, Mavenir, and ACL Digital. These companies are actively investing in research and development, forming strategic partnerships, and engaging in collaborative initiatives to drive innovation, expand their global footprint, and maintain a competitive edge in this rapidly evolving market.

Top 3 Companies

Amazon Web Services (AWS)
AWS commands a strong 15-17% market share in the telecom cloud sector by crafting cloud-native solutions that are finely tuned to handle network workloads. Through services like AWS Wavelength, which supports ultra-low-latency edge operations, AWS targets and captures telecom operators undergoing digital transformation. With extensive global infrastructure and a flexible consumption-based pricing model, AWS continues to fortify its position within core network implementations, thus improving its company analysis and increasing its company product portfolio. AWS maintains strategic alliances across Europe, Asia, and Africa, further corroborating its role as a critical ally in 5G rollout endeavors.

Google
Holding a 12-14% share, Google Cloud excels through formidable alliances with telecom operators, focusing on network transformation and automating subscriber data management. Google's platform supports scalable automation and AI-driven services tailored to meet the dynamic needs of communication service providers (CSPs). As a leader in open-source technologies like Kubernetes and Istio, Google aids CSPs in adopting multi-cloud strategies, bolstering its company market share and enhancing its strategic company positioning. Google continues to invest in 5G, particularly within high-demand regions such as North America and Asia, ensuring alignment with the evolving

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digital landscape.

Microsoft

Microsoft, with a 10-12% market share, is prominent in ensuring seamless hybrid applications on the cloud, thus targeting diverse enterprise needs. Its comprehensive telecom cloud strategy includes substantial investments in AI frameworks and secure connectivity solutions, crucial for CSPs transitioning to cloud-native functions. Microsoft’s trusted partnerships and tactical regional expansions underscore its authoritative presence in production environments, fortifying its company profiles and augmenting the company product portfolio. Through Microsoft Azure, the company maintains a strong foothold, driving innovation and upscaling cloud-based solutions tailored for telecom infrastructures.

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FIGURE 30 TELECOM CLOUD MARKET: RESEARCH DESIGN

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