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Telecom Cloud Market by Component (Platforms, Solutions, Services), NFV Software (VNFs/CNFs, NFVI), Cloud Service Model (SaaS, PaaS, IaaS), Deployment Model (Public, Private, Hybrid), and Region - Global Forecast to 2030

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Abstracts

The telecom cloud market is projected to grow from USD 22,261.8 million in 2025 to USD 56,005.8 million by 2030 at a compound annual growth rate (CAGR) of 20.3%. Growth in the telecom cloud market is driven by the global rollout of 5G, which enables advanced use cases such as enhanced Mobile Broadband (eMBB), massive Machine-Type Communications (mMTC), and Ultra-Reliable Low-Latency Communications (URLLC). Additionally, telecom cloud solutions significantly reduce CAPEX and OPEX by replacing hardware-intensive networks with scalable, software-defined infrastructure, making operations more agile, cost-efficient, and responsive to evolving service demands.

However, portability and expandability act as key restraints in the telecom cloud market, limiting the seamless integration and migration of network functions across diverse cloud environments. The absence of standardization leads to vendor lock-in and high transition costs, restricting scalability. Additionally, the rise in cyberthreats, including DDoS attacks, ransomware, and network breaches, undermines trust in cloud-based telecom operations. These security vulnerabilities restrain telcos from fully adopting cloud-native infrastructure, particularly for core and regulated network functions.

“By component, the solutions subsegment is expected to grow with the highest CAGR during the forecast period”

Telecom cloud solutions play a critical role in simplifying complex business and network

operations by enabling enterprises to fully leverage cloud capabilities. These solutions are built on advanced technologies such as artificial intelligence (AI), machine learning (ML), and big data analytics, which allow telecom operators to collect, visualize, analyze, and monitor data for actionable insights. By integrating these technologies, operators can achieve best-in-class performance across automated networks, business workflows, and operational processes. These solutions support enhanced customer experience while simultaneously optimizing total cost of ownership. Key offerings in this segment include network virtualization, cloudification, automation tools, management and orchestration platforms, and cloud-native core network solutions. As telecom providers pursue digital transformation, these solutions are essential for achieving operational agility, real-time service delivery, and sustainable network innovation, making them a cornerstone of the evolving telecom cloud ecosystem.

“By cloud service model, the PaaS segment is expected to grow at the highest CAGR during the forecast period”

The Platform-as-a-Service (PaaS) cloud service model in the telecom cloud market is expected to grow with the highest CAGR during the forecast period due to its ability to accelerate innovation and streamline development for telecom operators. By offering pre-configured development environments, PaaS enables rapid creation and deployment of cloud-native applications for 5G, IoT, and edge computing, cutting time-to-market and reducing operational expenses. Growing demand for AI-driven services, including network optimization and customer analytics, further boosts PaaS adoption, with AWS Elastic Kubernetes Service (EKS) and Azure Kubernetes Service (AKS) streamlining container orchestration. Notable implementations, such as AT&T’s integration of Red Hat OpenShift PaaS to enhance 5G core services, demonstrate the model’s scalability. PaaS also underpins Open RAN development, fostering interoperable, vendor-neutral ecosystems and reinforcing its role as a key enabler of digital transformation in telecom.

“Asia Pacific is expected to record the highest growth rate, while North America is expected to hold the largest market share during the forecast period”

Asia Pacific’s telecom cloud market will see rapid acceleration fueled by several regional dynamics. Leading economies are aggressively modernizing network infrastructure, with large-scale 5G deployments creating demand for distributed cloud environments and edge services. National initiatives on digital transformation, from India’s push for rural broadband to Singapore’s smart-nation agenda, are driving investments in cloud-native network cores and orchestration platforms. Major cloud providers are expanding their footprint with new hyperscale data centers and localized service offerings, while telco-cloud collaborations such as Reliance Jio's partnership with AWS for a cloud-native 5G core demonstrate growing operator-hyperscaler synergy. Open RAN pilots and private network rollouts in the manufacturing and logistics sectors are accelerating the adoption of virtualized RAN and automated management tools. These factors create a fertile environment for telecom operators to embrace scalable, software-defined architectures, ensuring Asia Pacific leads global cloud-native network transformation.

North America is expected to hold the largest market during the forecast period due to advanced infrastructure, extensive 5G deployment, and a favorable regulatory environment. Key factors include the shift to network virtualization, AI-driven automation, and a strong vendor ecosystem. These elements position the region to sustain its dominance in the global market.

Breakdown of Primaries

The study contains insights from various industry experts, from solution vendors to Tier 1 companies. The break-up of the primaries is as follows:

By Company Type: Tier 1 – 6%, Tier 2 – 23%, and Tier 3 – 15%

By Designation: C-level – 38%, Directors – 30%, Others – 32%

By Region: North America – 40%, Europe – 15%, Asia Pacific – 35%, Middle East & Africa – 5%, and Latin America- 5%.

The major players in the telecom cloud market include AWS (US), Microsoft (US), IBM (US), Broadcom (US), Oracle (US), Intellias (Ukraine), Nokia (Finland), Ericsson (Sweden), Huawei (China), ZTE (China), Juniper (US), Cisco (US), Amdocs (US), Virtusa (US), Mavenir (US), ACL Digital (US), Alibaba Cloud (China), Robin.IO (US), NFWare (US), Telenity (Turkey), Inmanta (Belgium), UK Cloud Communications (UK). These players have adopted various growth strategies, such as partnerships, agreements and collaborations, new product launches, enhancements, and acquisitions to expand their telecom cloud market footprint.

Research Coverage

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The market study covers the telecom cloud market size across different segments. It aims to estimate the market size and growth potential across different segments, including component, deployment model, cloud service model, NFV software, and region. The study includes an in-depth competitive analysis of the leading market players, their company profiles, key observations related to product and business offerings, recent developments, and market strategies.

Key Benefits of Buying the Report

The report will help market leaders and new entrants with information on the closest approximations of the global telecom cloud market's revenue numbers and subsegments. It will also help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. Moreover, the report will provide insights for stakeholders to understand the market's pulse and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

1. Analysis of key drivers (emergence of 5G standard and Iot usage in 5G catalyze demand for telco cloud, growth witnessed by cloud-native environment, reduction of OPEX and CAPEX using telecom cloud, growth in 5G paving eMBB, mMTC, and URLLC), restraints (portability and interoperability issues, cyberattacks damaging systems), opportunities (demand for Open RAN and private 5G network, need for SDN and NFV-based cloud-native solutions), and challenges (risk of information loss, stringent government regulations, complexities related to operating environment) influencing the growth of the telecom cloud market

2. Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the telecom cloud market

3. Market Development: Comprehensive information about lucrative markets – analysis of the telecom cloud market across various regions

4. Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the telecom cloud market

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5. Competitive Assessment: In-depth assessment of market shares, growth strategies and service offerings of leading players such as AWS (US), Microsoft (US), IBM (US), Broadcom (US), Oracle (US), Intellias (Ukraine), Nokia (Finland), Ericsson (Sweden), Huawei (China), ZTE (China), Juniper (US), Cisco (US), Amdocs (US), Virtusa (US), Mavenir (US), ACL Digital (US), Alibaba Cloud (China), Robin.IO (US), NFWare (US), Telenity (Turkey), Inmanta (Belgium), and UK Cloud Communications (UK)

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