

# **Cloud-Based Telecom Mediation Market Forecasts to 2034 – Global Analysis By Component (Cloud-Native Mediation Software, Data Collection & Aggregation Modules, Real-Time Processing Engines, Charging Gateway Functions, AI-Driven Mediation Analytics, API Management & Integration Layer and Professional & Managed Services), Deployment Mode, Technology, Application, End User and By Geography**

<https://marketpublishers.com/r/CD3CF9E00DB2EN.html>

Date: June 2026

Pages: 200

Price: US\$ 4,150.00 (Single User License)

ID: CD3CF9E00DB2EN

## **Abstracts**

According to Statistics MRC, the Global Cloud-Based Telecom Mediation Market is accounted for \$4.4 billion in 2026 and is expected to reach \$9.5 billion by 2034 growing at a CAGR of 10.0% during the forecast period. Cloud-Based Telecom Mediation refers to the use of cloud computing platforms to collect, process, transform, and distribute telecom network data between operational systems and business support systems. It enables telecom operators to manage billing records, usage data, network events, and service information efficiently through a scalable and centralized cloud infrastructure. This approach supports real-time data processing, operational flexibility, cost optimization, and seamless integration across modern telecom ecosystems and digital service environments.

### **Market Dynamics:**

Driver:

5G billing complexity

The transition to 5G networks and the proliferation of new service models, including network slicing, IoT connectivity, and edge computing, are dramatically increasing the complexity of telecom billing and mediation processes. Traditional mediation systems struggle to handle the volume, variety, and velocity of data generated by modern network architectures deployed across hybrid cloud environments. The need for real-time charging mediation and dynamic pricing models for 5G services requires flexible, cloud-native mediation platforms that can scale elastically. MVNOs and digital service providers require agile mediation capabilities that can be rapidly configured for new service offerings without lengthy deployment cycles.

Restraint:

#### Migration complexity

The migration from legacy mediation systems to cloud-native platforms presents significant operational risks and technical complexity for established telecom operators. Legacy mediation systems are deeply integrated with billing, CRM, and network management systems through complex custom interfaces developed over decades of operation. Data migration from legacy formats to cloud-native schemas requires extensive transformation and validation to ensure revenue integrity. The parallel operation of legacy and cloud mediation systems during transition periods creates operational complexity and increases the risk of revenue leakage.

Opportunity:

#### API economy growth

The expanding API economy and the proliferation of digital service ecosystems are creating significant opportunities for cloud-based telecom mediation platforms that can integrate diverse data sources and service providers. The rise of platform business models in telecommunications requires mediation capabilities that can process data from partner networks, IoT platforms, and digital service providers through standardized APIs. The integration of blockchain and smart contract technologies with mediation platforms enables automated settlement and revenue sharing across complex partner ecosystems. The growth of embedded connectivity services in automotive, industrial, and consumer devices creates new data streams that require mediation for billing and service assurance.

Threat:

## In-house development

The growing technical sophistication of telecom operators and the availability of cloud-native development tools are enabling larger operators to build custom mediation capabilities in-house rather than purchasing commercial platforms. Tier-1 operators with substantial development resources are increasingly preferring proprietary mediation solutions that provide complete control over functionality and roadmap. Open-source mediation frameworks and cloud-native data processing technologies reduce the barriers to building custom mediation systems. The long-term total cost of ownership for in-house development can be favorable for operators with sufficient scale and technical capabilities.

## Covid-19 Impact:

The COVID-19 pandemic accelerated cloud migration across all industries, including telecommunications, as operators sought to reduce dependency on physical infrastructure and enable remote operations. The surge in digital service usage increased data volumes that mediation systems process, highlighting the scalability advantages of cloud-native platforms. Remote work requirements for billing and operations teams increased demand for cloud-based systems accessible from distributed locations. Post-pandemic, the demonstrated resilience and scalability of cloud platforms have sustained migration momentum away from legacy on-premises mediation systems.

The cloud-native mediation software segment is expected to be the largest during the forecast period

The cloud-native mediation software segment is expected to account for the largest market share during the forecast period, due to its role as the core processing engine for transforming and routing telecom usage data. This software handles the critical functions of data collection, normalization, and distribution between network elements and business support systems. The transition from legacy mediation hardware to cloud-native software deployments drives demand for flexible, scalable mediation platforms. Software vendors are enhancing their offerings with microservices architecture and containerization for elastic scaling. The software segment benefits from recurring subscription revenue models that provide predictable income streams.

The AI-driven mediation analytics segment is expected to have the highest CAGR

during the forecast period

Over the forecast period, the AI-driven mediation analytics segment is predicted to witness the highest growth rate, driven by the integration of artificial intelligence into mediation processes for fraud detection, revenue assurance, and predictive workload management. These analytics capabilities process mediation data to identify anomalous patterns that may indicate revenue leakage or fraudulent activity. The increasing volume and velocity of data in 5G networks create demand for AI-powered analytics that can process mediation data at scale. Vendors are developing machine learning models trained on historical mediation patterns to improve detection accuracy. The segment benefits from the operational imperative to maximize revenue capture and minimize financial losses.

### **Region with largest share:**

During the forecast period, the North America region is expected to hold the largest market share, due to early cloud adoption among telecom operators and the presence of major cloud platform providers. The United States hosts the headquarters of Amazon Web Services, Microsoft Azure, and Google Cloud, which are developing telecom-specific cloud services. Major operators, including Verizon, AT&T, and T-Mobile, are migrating mediation workloads to cloud platforms. Strong enterprise SaaS adoption creates favorable conditions for cloud-based mediation services. The region benefits from advanced cloud infrastructure and a mature ecosystem of telecom software vendors.

### **Region with highest CAGR:**

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, due to rapid cloud adoption among telecom operators and government digital transformation initiatives. China leads with government-supported cloud infrastructure investments by major operators and technology companies. India is experiencing rapid migration of telecom workloads to cloud platforms through government and private sector programs. Japan and South Korea maintain advanced cloud adoption that supports cloud-native mediation deployments. The region benefits from expanding digital payment ecosystems and IoT connectivity that generate mediation data volumes.

### **Key players in the market**

Some of the key players in Cloud-Based Telecom Mediation Market include Oracle

Corporation, Amdocs Limited, CSG Systems International, Inc., Netcracker Technology Corporation, Ericsson, Huawei Technologies Co., Ltd., Nokia Corporation, SAP SE, IBM Corporation, Microsoft Corporation, Amazon Web Services, Inc., Google LLC, Comarch SA, Cerillion plc, Tecnotree Corporation and Optiva Inc..

### **Key Developments:**

In May 2026, Oracle Corporation launched a cloud-native mediation platform enabling real-time charging data processing for 5G network slicing services, enhancing billing accuracy, scalability, and telecom revenue management efficiency.

In April 2026, Amdocs Limited expanded its cloud mediation suite with AI-powered fraud detection and revenue assurance capabilities, improving telecom billing transparency, operational efficiency, and protection against revenue leakage risks.

In March 2026, Ericsson introduced a microservices-based mediation solution enabling elastic scaling for IoT data aggregation workloads, supporting high-volume telecom data processing and improving network service flexibility and responsiveness.

### **Components Covered:**

Cloud-Native Mediation Software

Data Collection & Aggregation Modules

Real-Time Processing Engines

Charging Gateway Functions

AI-Driven Mediation Analytics

API Management & Integration Layer

Professional & Managed Services

### **Deployment Modes Covered:**

Public Cloud

Private Cloud

Hybrid Cloud

Multi-Cloud Deployment

SaaS-Based Delivery

#### Technologies Covered:

Kubernetes-Based Orchestration

AI-Driven Workload Prediction

Microservices Architecture

Containerization

API-Based Interoperability

Real-Time Streaming Analytics

Serverless Computing

#### Applications Covered:

5G Data Mediation

IoT Data Aggregation & Mediation

Real-Time Charging Mediation

Revenue Assurance

Fraud Management

Partner Settlement & Interconnect

Usage Data Record Processing

End Users Covered:

Mobile Network Operators

MVNOs & MVNEs

Internet Service Providers

Satellite Communication Providers

Cloud Communication Providers

Cable Network Providers

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

#### Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

## South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

## Rest of the World (RoW)

### Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

### Africa

South Africa

Egypt

Morocco

Rest of Africa

**What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

**Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

**Company Profiling**

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

**Regional Segmentation**

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

**Competitive Benchmarking**

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

## Contents

### **1 EXECUTIVE SUMMARY**

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

### **2 RESEARCH FRAMEWORK**

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
  - 2.4.1 Data Collection (Primary and Secondary)
  - 2.4.2 Data Modeling and Estimation Techniques
  - 2.4.3 Data Validation and Triangulation
  - 2.4.4 Analytical and Forecasting Approach

### **3 MARKET DYNAMICS AND TREND ANALYSIS**

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

### **4 COMPETITIVE AND STRATEGIC ASSESSMENT**

- 4.1 Porter's Five Forces Analysis
  - 4.1.1 Supplier Bargaining Power
  - 4.1.2 Buyer Bargaining Power
  - 4.1.3 Threat of Substitutes
  - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

## **5 GLOBAL CLOUD-BASED TELECOM MEDIATION MARKET, BY COMPONENT**

- 5.1 Cloud-Native Mediation Software
- 5.2 Data Collection & Aggregation Modules
- 5.3 Real-Time Processing Engines
- 5.4 Charging Gateway Functions
- 5.5 AI-Driven Mediation Analytics
- 5.6 API Management & Integration Layer
- 5.7 Professional & Managed Services

## **6 GLOBAL CLOUD-BASED TELECOM MEDIATION MARKET, BY DEPLOYMENT MODE**

- 6.1 Public Cloud
- 6.2 Private Cloud
- 6.3 Hybrid Cloud
- 6.4 Multi-Cloud Deployment
- 6.5 SaaS-Based Delivery

## **7 GLOBAL CLOUD-BASED TELECOM MEDIATION MARKET, BY TECHNOLOGY**

- 7.1 Kubernetes-Based Orchestration
- 7.2 AI-Driven Workload Prediction
- 7.3 Microservices Architecture
- 7.4 Containerization
- 7.5 API-Based Interoperability
- 7.6 Real-Time Streaming Analytics
- 7.7 Serverless Computing

## **8 GLOBAL CLOUD-BASED TELECOM MEDIATION MARKET, BY APPLICATION**

- 8.1 5G Data Mediation
- 8.2 IoT Data Aggregation & Mediation
- 8.3 Real-Time Charging Mediation
- 8.4 Revenue Assurance

- 8.5 Fraud Management
- 8.6 Partner Settlement & Interconnect
- 8.7 Usage Data Record Processing

## **9 GLOBAL CLOUD-BASED TELECOM MEDIATION MARKET, BY END USER**

- 9.1 Mobile Network Operators
- 9.2 MVNOs & MVNEs
- 9.3 Internet Service Providers
- 9.4 Satellite Communication Providers
- 9.5 Cloud Communication Providers
- 9.6 Cable Network Providers

## **10 GLOBAL CLOUD-BASED TELECOM MEDIATION MARKET, BY GEOGRAPHY**

- 10.1 North America
  - 10.1.1 United States
  - 10.1.2 Canada
  - 10.1.3 Mexico
- 10.2 Europe
  - 10.2.1 United Kingdom
  - 10.2.2 Germany
  - 10.2.3 France
  - 10.2.4 Italy
  - 10.2.5 Spain
  - 10.2.6 Netherlands
  - 10.2.7 Belgium
  - 10.2.8 Sweden
  - 10.2.9 Switzerland
  - 10.2.10 Poland
  - 10.2.11 Rest of Europe
- 10.3 Asia Pacific
  - 10.3.1 China
  - 10.3.2 Japan
  - 10.3.3 India
  - 10.3.4 South Korea
  - 10.3.5 Australia
  - 10.3.6 Indonesia
  - 10.3.7 Thailand

- 10.3.8 Malaysia
- 10.3.9 Singapore
- 10.3.10 Vietnam
- 10.3.11 Rest of Asia Pacific
- 10.4 South America
  - 10.4.1 Brazil
  - 10.4.2 Argentina
  - 10.4.3 Colombia
  - 10.4.4 Chile
  - 10.4.5 Peru
  - 10.4.6 Rest of South America
- 10.5 Rest of the World (RoW)
  - 10.5.1 Middle East
    - 10.5.1.1 Saudi Arabia
    - 10.5.1.2 United Arab Emirates
    - 10.5.1.3 Qatar
    - 10.5.1.4 Israel
    - 10.5.1.5 Rest of Middle East
  - 10.5.2 Africa
    - 10.5.2.1 South Africa
    - 10.5.2.2 Egypt
    - 10.5.2.3 Morocco
    - 10.5.2.4 Rest of Africa

## **11 STRATEGIC MARKET INTELLIGENCE**

- 11.1 Industry Value Network and Supply Chain Assessment
- 11.2 White-Space and Opportunity Mapping
- 11.3 Product Evolution and Market Life Cycle Analysis
- 11.4 Channel, Distributor, and Go-to-Market Assessment

## **12 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES**

- 12.1 Mergers and Acquisitions
- 12.2 Partnerships, Alliances, and Joint Ventures
- 12.3 New Product Launches and Certifications
- 12.4 Capacity Expansion and Investments
- 12.5 Other Strategic Initiatives

## 13 COMPANY PROFILES

- 13.1 Oracle Corporation
- 13.2 Amdocs Limited
- 13.3 CSG Systems International, Inc.
- 13.4 Netcracker Technology Corporation
- 13.5 Ericsson
- 13.6 Huawei Technologies Co., Ltd.
- 13.7 Nokia Corporation
- 13.8 SAP SE
- 13.9 IBM Corporation
- 13.10 Microsoft Corporation
- 13.11 Amazon Web Services, Inc.
- 13.12 Google LLC
- 13.13 Comarch SA
- 13.14 Cerillion plc
- 13.15 Tecnotree Corporation
- 13.16 Optiva Inc.

## List Of Tables

### LIST OF TABLES

- Table 1 Global Cloud-Based Telecom Mediation Market Outlook, By Region (2023-2034) (\$MN)
- Table 2 Global Cloud-Based Telecom Mediation Market Outlook, By Component (2023-2034) (\$MN)
- Table 3 Global Cloud-Based Telecom Mediation Market Outlook, By Cloud-Native Mediation Software (2023-2034) (\$MN)
- Table 4 Global Cloud-Based Telecom Mediation Market Outlook, By Data Collection & Aggregation Modules (2023-2034) (\$MN)
- Table 5 Global Cloud-Based Telecom Mediation Market Outlook, By Real-Time Processing Engines (2023-2034) (\$MN)
- Table 6 Global Cloud-Based Telecom Mediation Market Outlook, By Charging Gateway Functions (2023-2034) (\$MN)
- Table 7 Global Cloud-Based Telecom Mediation Market Outlook, By AI-Driven Mediation Analytics (2023-2034) (\$MN)
- Table 8 Global Cloud-Based Telecom Mediation Market Outlook, By API Management & Integration Layer (2023-2034) (\$MN)
- Table 9 Global Cloud-Based Telecom Mediation Market Outlook, By Professional & Managed Services (2023-2034) (\$MN)
- Table 10 Global Cloud-Based Telecom Mediation Market Outlook, By Deployment Mode (2023-2034) (\$MN)
- Table 11 Global Cloud-Based Telecom Mediation Market Outlook, By Public Cloud (2023-2034) (\$MN)
- Table 12 Global Cloud-Based Telecom Mediation Market Outlook, By Private Cloud (2023-2034) (\$MN)
- Table 13 Global Cloud-Based Telecom Mediation Market Outlook, By Hybrid Cloud (2023-2034) (\$MN)
- Table 14 Global Cloud-Based Telecom Mediation Market Outlook, By Multi-Cloud Deployment (2023-2034) (\$MN)
- Table 15 Global Cloud-Based Telecom Mediation Market Outlook, By SaaS-Based Delivery (2023-2034) (\$MN)
- Table 16 Global Cloud-Based Telecom Mediation Market Outlook, By Technology (2023-2034) (\$MN)
- Table 17 Global Cloud-Based Telecom Mediation Market Outlook, By Kubernetes-Based Orchestration (2023-2034) (\$MN)
- Table 18 Global Cloud-Based Telecom Mediation Market Outlook, By AI-Driven

Workload Prediction (2023-2034) (\$MN)

Table 19 Global Cloud-Based Telecom Mediation Market Outlook, By Microservices Architecture (2023-2034) (\$MN)

Table 20 Global Cloud-Based Telecom Mediation Market Outlook, By Containerization (2023-2034) (\$MN)

Table 21 Global Cloud-Based Telecom Mediation Market Outlook, By API-Based Interoperability (2023-2034) (\$MN)

Table 22 Global Cloud-Based Telecom Mediation Market Outlook, By Real-Time Streaming Analytics (2023-2034) (\$MN)

Table 23 Global Cloud-Based Telecom Mediation Market Outlook, By Serverless Computing (2023-2034) (\$MN)

Table 24 Global Cloud-Based Telecom Mediation Market Outlook, By Application (2023-2034) (\$MN)

Table 25 Global Cloud-Based Telecom Mediation Market Outlook, By 5G Data Mediation (2023-2034) (\$MN)

Table 26 Global Cloud-Based Telecom Mediation Market Outlook, By IoT Data Aggregation & Mediation (2023-2034) (\$MN)

Table 27 Global Cloud-Based Telecom Mediation Market Outlook, By Real-Time Charging Mediation (2023-2034) (\$MN)

Table 28 Global Cloud-Based Telecom Mediation Market Outlook, By Revenue Assurance (2023-2034) (\$MN)

Table 29 Global Cloud-Based Telecom Mediation Market Outlook, By Fraud Management (2023-2034) (\$MN)

Table 30 Global Cloud-Based Telecom Mediation Market Outlook, By Partner Settlement & Interconnect (2023-2034) (\$MN)

Table 31 Global Cloud-Based Telecom Mediation Market Outlook, By Usage Data Record Processing (2023-2034) (\$MN)

Table 32 Global Cloud-Based Telecom Mediation Market Outlook, By End User (2023-2034) (\$MN)

Table 33 Global Cloud-Based Telecom Mediation Market Outlook, By Mobile Network Operators (2023-2034) (\$MN)

Table 34 Global Cloud-Based Telecom Mediation Market Outlook, By MVNOs & MVNEs (2023-2034) (\$MN)

Table 35 Global Cloud-Based Telecom Mediation Market Outlook, By Internet Service Providers (2023-2034) (\$MN)

Table 36 Global Cloud-Based Telecom Mediation Market Outlook, By Satellite Communication Providers (2023-2034) (\$MN)

Table 37 Global Cloud-Based Telecom Mediation Market Outlook, By Cloud Communication Providers (2023-2034) (\$MN)

Table 38 Global Cloud-Based Telecom Mediation Market Outlook, By Cable Network Providers (2023-2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

## I would like to order

Product name: Cloud-Based Telecom Mediation Market Forecasts to 2034 – Global Analysis By Component (Cloud-Native Mediation Software, Data Collection & Aggregation Modules, Real-Time Processing Engines, Charging Gateway Functions, AI-Driven Mediation Analytics, API Management & Integration Layer and Professional & Managed Services), Deployment Mode, Technology, Application, End User and By Geography

Product link: <https://marketpublishers.com/r/CD3CF9E00DB2EN.html>

Price: US\$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/CD3CF9E00DB2EN.html>