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Network Exposure Functions Market Forecasts to 2034– Global Analysis By Component (Solutions and Services), Network Type, Deployment Mode, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Network Exposure Functions Market is accounted for $2.02 billion in 2026 and is expected to reach $17.37 billion by 2034 growing at a CAGR of 30.8% during the forecast period. Network Exposure Functions (NEF) are standardized components within 5G core networks that securely expose network capabilities and data to external applications via APIs. Defined by 3rd Generation Partnership Project, NEF acts as an intermediary between telecom operators and third party service providers, enabling controlled access to network events, subscriber information, and quality-of-service parameters. It ensures authentication, authorization, and policy enforcement while maintaining data privacy and security. NEF supports use cases such as IoT management, edge computing, and network slicing, allowing operators to monetize network assets and foster innovation through seamless integration with external ecosystems.

Market Dynamics:

Driver:

Expansion of 5G Networks and API Economy

The rapid global rollout of 5G networks, guided by standards from 3rd Generation Partnership Project, is fueling demand for Network Exposure Functions. As telecom operators transition to cloud-native architectures, APIs are becoming central to service delivery and innovation. NEF enables seamless exposure of network capabilities to

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developers, accelerating the API economy. This shift supports advanced use cases such as IoT, autonomous systems, and smart cities, driving adoption as enterprises increasingly rely on programmable, on-demand network services. Thus, it drives the growth of the market.

Restraint:

Complexity of Integration with Legacy Systems

Integrating Network Exposure Functions into existing telecom infrastructures presents significant challenges, particularly for operators relying on legacy systems. Many traditional networks lack the flexibility required for seamless API-based interactions, leading to costly upgrades and operational disruptions. Compatibility issues between legacy and cloud native environments further complicate deployment. Additionally, the need for skilled personnel to manage hybrid architectures increases implementation complexity, slowing adoption rates as organizations struggle to balance modernization with ongoing service continuity.

Opportunity:

Growing Demand for Network Monetization

The increasing need for telecom operators to diversify revenue streams is creating strong opportunities for Network Exposure Functions. By exposing network capabilities through secure APIs, operators can offer value-added services to enterprises, developers, and digital platforms. This enables new business models such as network-as-a-service and dynamic quality-of-service provisioning. As industries embrace digital transformation, NEF empowers operators to monetize data insights and network functionalities, fostering partnerships and unlocking new revenue channels in an increasingly competitive telecom landscape.

Threat:

Data Security and Privacy Concerns

As Network Exposure Functions enable external access to sensitive network data, concerns around data security and privacy pose a significant threat. Unauthorized access, data breaches, and misuse of subscriber information can undermine trust and regulatory compliance. Telecom operators must implement robust authentication,

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encryption, and policy controls to mitigate risks. However, evolving cyber threats and stringent data protection regulations increase operational complexity, potentially hindering adoption and limiting the extent to which network capabilities can be safely exposed.

Covid-19 Impact:

The COVID-19 pandemic accelerated digital transformation across industries, indirectly boosting the relevance of Network Exposure Functions. Increased reliance on remote connectivity, cloud services, and digital applications highlighted the need for flexible and programmable networks. Telecom operators expanded infrastructure investments to handle surging data traffic, creating favorable conditions for NEF adoption. However, initial disruptions in supply chains and delayed network deployments temporarily slowed progress. Post-pandemic, the emphasis on resilient and API-driven networks continues to drive market growth.

The manufacturing segment is expected to be the largest during the forecast period

The manufacturing segment is expected to account for the largest market share during the forecast period, due to growing adoption of Industry 4.0 technologies. Smart factories rely on real-time data exchange, automation, and connected devices, all of which require reliable and programmable network capabilities. Network Exposure Functions enable manufacturers to access network insights, optimize operations, and ensure low-latency communication. This enhances production efficiency, predictive maintenance, and supply chain visibility, making NEF a critical component in modern industrial ecosystems.

The edge computing segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the edge computing segment is predicted to witness the highest growth rate, as enterprises increasingly demand low latency data processing and real-time decision-making. Network Exposure Functions play a vital role by enabling applications to interact directly with network resources at the edge. This supports use cases such as autonomous vehicles, augmented reality, and smart infrastructure. As edge deployments expand alongside 5G networks, NEF adoption is expected to accelerate, driving significant growth in this segment.

Region with largest share:

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During the forecast period, the North America region is expected to hold the largest market share, due to early adoption of 5G technologies and strong presence of leading telecom operators and technology providers. The region benefits from advanced digital infrastructure, high investment in network innovation, and a mature API ecosystem. Enterprises across sectors are actively leveraging programmable networks to enhance service delivery. Additionally, supportive regulatory frameworks and continuous R&D efforts contribute to the widespread adoption of Network Exposure Functions in the region.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, owing to rapid 5G deployment, expanding digital economies, and increasing adoption of IoT solutions. Countries across the region are investing heavily in smart city initiatives, industrial automation, and next-generation connectivity. The growing number of mobile subscribers and rising demand for high-speed data services further drive market expansion. Network Exposure Functions enable telecom operators in the region to innovate and scale services efficiently, supporting sustained high growth.

Key players in the market

Some of the key players in Network Exposure Functions Market include Ericsson, Nokia, Huawei Technologies, Cisco Systems, ZTE Corporation, NEC Corporation, Mavenir, Amdocs, Hewlett Packard Enterprise, Oracle Corporation, Samsung Electronics, Casa Systems, Ribbon Communications, Radisys and MATRIXX Software.

Key Developments:

In January 2026, Nokia has signed a multi?year patent license agreement with Hisense allowing the consumer electronics maker to use its video technology in televisions, ending all patent litigation between them worldwide. Under the confidential deal, Hisense will pay Nokia royalties, marking the first such licensing partnership between the two companies.

In December 2025, Nokia has struck royalty?bearing Wi?Fi patent licensing deals with automakers Stellantis and Mercedes?Benz, letting them legally use its wireless LAN tech in connected vehicles. These latest agreements highlight Nokia’s long?standing leadership in vehicle connectivity innovation and strengthen its automotive IP footprint.

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Components Covered:

- Solutions
- Services

Network Types Covered:

- 3G
- 4G/LTE
- 5G

Deployment Modes Covered:

- On-Premises
- Cloud-Based

Applications Covered:

- IoT Connectivity
- Edge Computing
- Network Slicing
- Enhanced Mobile Broadband
- API Exposure & Monetization
- Other Applications

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End Users Covered:

- IT & Telecommunications
- Manufacturing
- Automotive & Transportation
- Healthcare
- Retail & E-commerce
- Other End Users

Regions Covered:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - United Kingdom
  - Germany
  - France
  - Italy
  - Spain
  - Netherlands

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- 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

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- 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

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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

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

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