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Telco Cloud Market Forecasts to 2034 – Global Analysis By Componnet (Platforms, Solutions and Services), Cloud Service Model, Deployment Model, Organization Size, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Telco Cloud Market is accounted for $32.5 billion in 2026 and is expected to reach $118.4 billion by 2034 growing at a CAGR of 17.5% during the forecast period. Telco cloud refers to virtualized communication infrastructure that enables telecom operators to deliver network services using cloud-native platforms. It integrates NFV infrastructure, VNFs/CNFs, service orchestration, and automation tools to support 5G core networks, OSS/BSS transformation, edge computing, and content delivery. By leveraging public, private, and hybrid cloud models, telco cloud solutions enhance scalability, reduce operational costs, and accelerate service innovation. These platforms are critical for telecom operators, cloud service providers, and enterprises seeking agile, software-defined network environments.

Market Dynamics:

Driver:

5G core network cloudification

5G standalone core network architecture mandating cloud-native network function deployment based on 3GPP service-based architecture specifications is compelling global telecom operators to invest in telco cloud infrastructure capable of hosting virtualized and containerized 5G core functions including Access and Mobility Management Function, Session Management Function, and User Plane Function on

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scalable Kubernetes-orchestrated platforms. The performance requirements of 5G network slicing for enterprise customers, ultra-reliable low-latency communications applications, and massive IoT connectivity cannot be met through legacy hardware-based core network architectures, making telco cloud adoption a technical prerequisite for commercial 5G service differentiation and enterprise contract competitiveness across global operator markets.

Restraint:

Legacy OSS/BSS integration complexity

Deep integration dependencies between cloud-native 5G network functions and legacy operations support systems and business support systems built on decades-old proprietary platforms create substantial migration complexity and cost overruns in telco cloud transformation programs. The interdependence of billing, provisioning, fault management, and service assurance workflows with underlying network infrastructure makes sequential migration approaches risky while comprehensive parallel replacement programs require multi-year investment horizons exceeding typical technology budget planning cycles. Many operators report that OSS/BSS transformation costs and timelines consistently exceed initial estimates, creating risk aversion among CTO organizations that slows telco cloud adoption pace and extends return-on-investment realization timelines beyond business case projections.

Opportunity:

Open RAN cloud integration growth

Open Radio Access Network architecture adoption, driven by disaggregation of traditional base station hardware into standardized software components running on commercial cloud infrastructure, is creating substantial new telco cloud procurement requirements for distributed unit processing, centralized unit hosting, and RAN intelligent controller platforms. Government-backed Open RAN programs in the United States, United Kingdom, Japan, and India are mandating open interface adoption at national operators, accelerating cloud-native RAN software procurement from vendors including Rakuten Group Inc, Mavenir Systems Inc, and Affirmed Networks. The addressable telco cloud expansion from RAN cloudification represents a multi-hundred-billion-dollar incremental market opportunity beyond core network virtualization programs already underway at major global operators.

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Threat:

Hyperscaler competitive displacement risk

Aggressive expansion by hyperscale public cloud providers, including Amazon Web Services Inc, Microsoft Corporation, and Google LLC, into telecommunications-grade cloud infrastructure through dedicated telco-edge programs, 5G core partnerships, and carrier-grade service level agreement offerings threatens to displace specialized telco cloud platform vendors and reduce differentiation opportunities for traditional telecom equipment suppliers. Hyperscalers offering integrated public cloud, private edge deployment, and network function software bundles can compete on total cost of ownership metrics that purpose-built telco cloud hardware vendors struggle to match at scale. The migration of telco workloads to hyperscaler infrastructure also raises strategic concerns for operators about vendor lock-in and loss of network data sovereignty over sensitive subscriber traffic and operational intelligence.

Covid-19 Impact:

Pandemic-era voice and data traffic surges validated the scalability advantages of cloud-native network architectures over hardware-based alternatives, accelerating operator board-level commitment to telco cloud transformation programs. Remote work normalization created sustained enterprise demand for cloud-based virtual private network, unified communications, and SD-WAN services that telco cloud infrastructure directly enables. Post-pandemic capital expenditure reallocation from physical network infrastructure toward software-defined cloud architectures has maintained strong telco cloud investment growth across all major regional operator groups.

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

The solutions segment is expected to account for the largest market share during the forecast period, due to the high value of network management, service orchestration, and integration and deployment solution contracts awarded as operators undertake large-scale telco cloud transformation programs requiring comprehensive software portfolios to manage virtualized network function lifecycle operations. Network management solutions enabling unified visibility and control across hybrid physical and virtual network infrastructure command substantial enterprise contract values from operators managing complex multi-vendor cloud environments. Service orchestration platforms from vendors including Cisco Systems Inc, Ericsson, and Nokia Corporation that automate end-to-end network slice provisioning and service fulfillment generate

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recurring software subscription revenues essential for operator commercial 5G monetization strategies.

The infrastructure as a service (IaaS) segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Infrastructure as a Service (IaaS) segment is predicted to witness the highest growth rate, driven by the transition of telco compute, storage, and networking resource provisioning from owned hardware capital expenditure toward flexible consumption-based cloud infrastructure models that align infrastructure costs with actual network traffic demands. IaaS adoption by telecom operators enables elastic scaling of 5G core network capacity during traffic peaks without over-provisioning dedicated hardware reserves. Public cloud IaaS offerings from Amazon Web Services Inc, Microsoft Corporation, and Google LLC targeting carrier-grade workloads are gaining traction as operators seek to offload non-latency-sensitive network functions to cost-efficient hyperscaler infrastructure while retaining performance-critical processing at private telco cloud edge nodes.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to advanced 5G standalone network deployment timelines at AT&T, T-Mobile, and Verizon, driving large-scale telco cloud infrastructure procurement to support commercial network slicing and enterprise private network services. The concentration of hyperscale cloud infrastructure capacity and telco cloud platform vendors, including VMware Inc, Red Hat Inc, and Cisco Systems Inc in the United States creates a mature supplier ecosystem supporting rapid technology adoption. Federal government open RAN funding programs and FirstNet public safety network infrastructure investments are generating significant additional telco cloud procurement outside commercial operator budgets.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, due to simultaneous 5G standalone core deployment programs at China Mobile, China Telecom, Rakuten Mobile, SK Telecom, and KT Corporation, representing the world's largest aggregate telco cloud transformation investment by operator count and total network scale. China government's strategic technology programs mandating domestic cloud infrastructure adoption are driving large-scale procurement from

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domestic vendors. India operator Reliance Jio's greenfield cloud-native 5G network architecture represents one of the largest single telco cloud deployment programs globally, with follow-on infrastructure expansion creating sustained regional market growth.

Key players in the market

Some of the key players in Telco Cloud Market include Microsoft Corporation, Amazon Web Services Inc, Google LLC, VMware Inc, IBM Corporation, Oracle Corporation, Huawei Technologies Co Ltd, Ericsson, Nokia Corporation, Cisco Systems Inc, Hewlett Packard Enterprise, Dell Technologies Inc, Red Hat Inc, Juniper Networks Inc, Mavenir Systems Inc, Rakuten Group Inc, and Affirmed Networks.

Key Developments:

In April 2026, Rakuten Group Inc expanded its cloud-native network platform commercial licensing program to three additional Asia Pacific operators, enabling them to deploy fully containerized 5G standalone core networks.

In March 2026, VMware Inc released Telco Cloud Platform 5.0 with enhanced Kubernetes-native network slice management capabilities, enabling automated lifecycle orchestration of virtualized network functions at carrier scale.

In February 2026, Nokia Corporation announced a major telco cloud transformation contract with a Tier-1 North American operator to deploy cloud-native 5G standalone core across its nationwide commercial network infrastructure.

Components Covered:

- Platforms
- Solutions
- Services

Cloud Service Models Covered:

- Infrastructure as a Service (IaaS)

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Platform as a Service (PaaS)

Software as a Service (SaaS)

Deployment Modes Covered:

Public Cloud

Private Cloud

Hybrid Cloud

Organization Sizes Covered:

Large Enterprises

Small & Medium Enterprises

Applications Covered:

Network Function Virtualization

Software Defined Networking

Edge Computing

5G Core Network

OSS/BSS Transformation

Content Delivery Network

End Users Covered:

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- Telecom Operators
- Cloud Service Providers
- Managed Service Providers
- Enterprises

Regions Covered:

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

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- 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

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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

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- 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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