

# **Telecom Cloud Native Market Forecasts to 2034 – Global Analysis By Component (Solutions, Services), Deployment Model, Network Function, Organization Size, Application, End User and By Geography**

<https://marketpublishers.com/r/TB185A65BE00EN.html>

Date: June 2026

Pages: 200

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

ID: TB185A65BE00EN

## **Abstracts**

According to Statistics MRC, the Global Telecom Cloud Native Market is accounted for \$4.7 billion in 2026 and is expected to reach \$17.6 billion by 2034 growing at a CAGR of 17.9% during the forecast period. Telecom cloud native refers to network architectures and software solutions built on cloud-native principles, including containerization, microservices, and DevOps methodologies, designed specifically for telecommunications infrastructure. These solutions replace legacy monolithic network functions with agile, auto-scaling applications deployed on public, private, or hybrid cloud environments. Key components include containerized network functions, cloud-native orchestration platforms, and service mesh solutions that enable telecom operators to deliver 5G, IoT, and edge computing services with greater agility, operational efficiency, and cost optimization.

### **Market Dynamics:**

Driver:

5G network cloudification acceleration

The global rollout of 5G networks is the primary catalyst for telecom cloud native adoption as operators modernize core network infrastructure to support ultra-low latency and massive connectivity requirements. Traditional hardware-centric network architectures cannot cost-effectively scale to meet 5G traffic demands, compelling operators to adopt cloud-native network functions. Disaggregation of telecom software

from proprietary hardware enables flexible multi-vendor deployments that reduce capital expenditure. Major operators worldwide are committing multi-billion-dollar investments to cloud-native 5G core transformation programs.

Restraint:

Legacy infrastructure migration complexity

Transitioning from deeply embedded legacy telecommunications infrastructure to cloud-native architectures involves substantial technical complexity, operational risk, and extended migration timelines. Network function interdependencies in live production environments complicate containerization and service decomposition efforts. Skilled personnel with expertise in both telecommunications and cloud-native technologies remain scarce, increasing project delivery risk. Coexistence requirements between legacy and cloud-native systems during transition periods add operational overhead and cost, slowing the pace of large-scale cloud-native telecom deployments.

Opportunity:

Edge computing service enablement

The convergence of telecom cloud-native platforms with multi-access edge computing creates substantial new service monetization opportunities for network operators. Cloud-native architectures enable the deployment of latency-sensitive applications including industrial automation, connected vehicles, and augmented reality, at the network edge. Telcos can leverage existing infrastructure and spectrum assets to offer edge-as-a-service capabilities to enterprise customers. This positions cloud-native telecom operators as critical enablers of Industry 4.0 transformation, expanding addressable markets significantly beyond traditional connectivity services.

Threat:

Hyperscaler competition intensifies

Leading cloud providers, including Amazon Web Services, Microsoft Azure, and Google Cloud, are aggressively entering the telecom cloud infrastructure market, offering purpose-built solutions that compete directly with traditional telco platforms. Their financial resources, developer ecosystems, and global infrastructure footprints present formidable competitive challenges for incumbent network equipment vendors and

telecom software providers. Operators that rely heavily on hyperscaler cloud platforms risk ceding strategic infrastructure control, creating long-term dependency and margin compression within cloud-native network transformation programs.

#### Covid-19 Impact:

COVID-19 dramatically accelerated telecom cloud-native adoption as operators faced unprecedented network traffic surges requiring rapid capacity scaling. Cloud-native architectures demonstrated superior elasticity compared to legacy infrastructure during pandemic-driven demand spikes. Remote work and digital service consumption trends permanently elevated baseline network capacity requirements, reinforcing operator business cases for cloud-native investment. Post-pandemic, accelerated enterprise digital transformation and government broadband stimulus programs continue to drive sustained cloud-native telecom infrastructure spending.

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 critical role of automated orchestration and lifecycle management in enabling efficient cloud-native telecom deployments. Operators require sophisticated automation platforms to manage thousands of containerized network functions across distributed cloud infrastructure. AI-driven automation reduces operational complexity and manual intervention requirements in dynamic 5G network environments. Continuous investment in zero-touch provisioning and closed-loop automation capabilities strengthens the segment's dominant market position.

The public cloud segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the public cloud segment is predicted to witness the highest growth rate, driven by increasing operator preference for scalable, opex-based cloud infrastructure models that reduce upfront capital commitment. Leading telecom operators are expanding partnerships with hyperscalers to deploy cloud-native network functions on public cloud platforms at scale. The availability of telco-grade public cloud offerings with carrier-class reliability, security, and compliance certifications accelerates adoption. Multi-cloud deployment strategies further diversify operator infrastructure dependencies while enabling best-of-breed service delivery.

#### Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to the most advanced 5G deployment programs among major operators including AT&T, Verizon, and T-Mobile, combined with a mature cloud technology ecosystem. Leading cloud-native telecom software vendors, including Amazon Web Services Inc. and Microsoft Corporation, are headquartered in the region. Strong enterprise demand for private 5G networks and edge computing services accelerates cloud-native platform adoption, reinforcing North America's leadership position throughout the forecast period.

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

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, due to massive 5G network expansion programs across China, South Korea, Japan, and India, driving unprecedented investment in cloud-native core network infrastructure. Government-backed digital infrastructure initiatives and large mobile subscriber bases create substantial demand for scalable cloud-native solutions. The region's growing number of telecom startups and MVNOs adopting cloud-native architectures from inception further accelerates market expansion across diverse operator segments.

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

Some of the key players in Telecom Cloud Native Market include Amazon Web Services Inc., Microsoft Corporation, Google LLC, International Business Machines Corporation, Oracle Corporation, Nokia Corporation, Telefonaktiebolaget LM Ericsson, Samsung Electronics Co., Ltd., VMware Inc., Red Hat Inc., Huawei Technologies Co., Ltd., Cisco Systems Inc., Capgemini SE, Amdocs Limited, Fujitsu Limited, NEC Corporation, Mavenir Systems Inc., and Wind River Systems Inc..

### **Key Developments:**

In May 2026, Amazon Web Services Inc. launched AWS Telco Cloud Platform enhancements with new cloud-native 5G core network function templates, enabling rapid deployment of containerized network workloads with carrier-grade reliability and automated scaling capabilities.

In April 2026, Nokia Corporation expanded its cloud-native portfolio with an AI-driven network automation platform supporting multi-cloud 5G core orchestration, enabling

telecom operators to achieve zero-touch deployment across heterogeneous infrastructure environments.

In March 2026, Red Hat Inc. partnered with a leading European telecom operator to deploy OpenShift-based cloud-native RAN solutions, enabling virtualized radio access network functions across distributed edge infrastructure for high-density urban 5G coverage.

#### Components Covered:

Solutions

Services

#### Deployment Models Covered:

Public Cloud

Private Cloud

Hybrid Cloud

#### Network Functions Covered:

Core Network

RAN Functions

OSS/BSS Applications

Content Delivery Network

Network Security

Edge Computing

Network Analytics

### Organization Sizes Covered:

Large Enterprises

Small & Medium Enterprises

Telecom Startups & MVNOs

### Applications Covered:

5G Core Deployment

Virtualized Network Infrastructure

Network Slicing

IoT Connectivity Management

Real-Time Analytics

Cloud-Native OSS/BSS Transformation

Edge Service Enablement

### End Users Covered:

Telecom Operators

Cloud Service Providers

Enterprises

Government & Defense

Media & Entertainment

Industrial Enterprises

Smart City Operators

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:**

*Telecom Cloud Native Market Forecasts to 2034 – Global Analysis By Component (Solutions, Services), Deployment...*

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 TELECOM CLOUD NATIVE MARKET, BY COMPONENT**

- 5.1 Solutions
  - 5.1.1 Containerized Network Functions
  - 5.1.2 Service Mesh Solutions
  - 5.1.3 Cloud-Native Orchestration
  - 5.1.4 Network Automation Platforms
- 5.2 Services
  - 5.2.1 Professional Services
  - 5.2.2 Managed Services
  - 5.2.3 Consulting & Integration Services

## **6 GLOBAL TELECOM CLOUD NATIVE MARKET, BY DEPLOYMENT MODEL**

- 6.1 Public Cloud
  - 6.1.1 Single-Cloud Deployment
  - 6.1.2 Multi-Cloud Deployment
- 6.2 Private Cloud
  - 6.2.1 On-Premises Cloud
  - 6.2.2 Hosted Private Cloud
- 6.3 Hybrid Cloud

## **7 GLOBAL TELECOM CLOUD NATIVE MARKET, BY NETWORK FUNCTION**

- 7.1 Core Network
- 7.2 RAN Functions
- 7.3 OSS/BSS Applications
- 7.4 Content Delivery Network
- 7.5 Network Security
- 7.6 Edge Computing
- 7.7 Network Analytics

## **8 GLOBAL TELECOM CLOUD NATIVE MARKET, BY ORGANIZATION SIZE**

- 8.1 Large Enterprises

8.2 Small & Medium Enterprises

8.3 Telecom Startups & MVNOs

## **9 GLOBAL TELECOM CLOUD NATIVE MARKET, BY APPLICATION**

9.1 5G Core Deployment

9.2 Virtualized Network Infrastructure

9.3 Network Slicing

9.4 IoT Connectivity Management

9.5 Real-Time Analytics

9.6 Cloud-Native OSS/BSS Transformation

9.7 Edge Service Enablement

## **10 GLOBAL TELECOM CLOUD NATIVE MARKET, BY END USER**

10.1 Telecom Operators

10.2 Cloud Service Providers

10.3 Enterprises

10.4 Government & Defense

10.5 Media & Entertainment

10.6 Industrial Enterprises

10.7 Smart City Operators

## **11 GLOBAL TELECOM CLOUD NATIVE MARKET, BY GEOGRAPHY**

11.1 North America

11.1.1 United States

11.1.2 Canada

11.1.3 Mexico

11.2 Europe

11.2.1 United Kingdom

11.2.2 Germany

11.2.3 France

11.2.4 Italy

11.2.5 Spain

11.2.6 Netherlands

11.2.7 Belgium

11.2.8 Sweden

11.2.9 Switzerland

- 11.2.10 Poland
- 11.2.11 Rest of Europe
- 11.3 Asia Pacific
  - 11.3.1 China
  - 11.3.2 Japan
  - 11.3.3 India
  - 11.3.4 South Korea
  - 11.3.5 Australia
  - 11.3.6 Indonesia
  - 11.3.7 Thailand
  - 11.3.8 Malaysia
  - 11.3.9 Singapore
  - 11.3.10 Vietnam
  - 11.3.11 Rest of Asia Pacific
- 11.4 South America
  - 11.4.1 Brazil
  - 11.4.2 Argentina
  - 11.4.3 Colombia
  - 11.4.4 Chile
  - 11.4.5 Peru
  - 11.4.6 Rest of South America
- 11.5 Rest of the World (RoW)
  - 11.5.1 Middle East
    - 11.5.1.1 Saudi Arabia
    - 11.5.1.2 United Arab Emirates
    - 11.5.1.3 Qatar
    - 11.5.1.4 Israel
    - 11.5.1.5 Rest of Middle East
  - 11.5.2 Africa
    - 11.5.2.1 South Africa
    - 11.5.2.2 Egypt
    - 11.5.2.3 Morocco
    - 11.5.2.4 Rest of Africa

## **12 STRATEGIC MARKET INTELLIGENCE**

- 12.1 Industry Value Network and Supply Chain Assessment
- 12.2 White-Space and Opportunity Mapping
- 12.3 Product Evolution and Market Life Cycle Analysis

12.4 Channel, Distributor, and Go-to-Market Assessment

## **13 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES**

13.1 Mergers and Acquisitions

13.2 Partnerships, Alliances, and Joint Ventures

13.3 New Product Launches and Certifications

13.4 Capacity Expansion and Investments

13.5 Other Strategic Initiatives

## **14 COMPANY PROFILES**

14.1 Amazon Web Services Inc.

14.2 Microsoft Corporation

14.3 Google LLC

14.4 International Business Machines Corporation

14.5 Oracle Corporation

14.6 Nokia Corporation

14.7 Telefonaktiebolaget LM Ericsson

14.8 Samsung Electronics Co., Ltd.

14.9 VMware Inc.

14.10 Red Hat Inc.

14.11 Huawei Technologies Co., Ltd.

14.12 Cisco Systems Inc.

14.13 Capgemini SE

14.14 Amdocs Limited

14.15 Fujitsu Limited

14.16 NEC Corporation

14.17 Mavenir Systems Inc.

14.18 Wind River Systems Inc.

## List Of Tables

### LIST OF TABLES

Table 1 Global Telecom Cloud Native Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Telecom Cloud Native Market Outlook, By Component (2023-2034) (\$MN)

Table 3 Global Telecom Cloud Native Market Outlook, By Solutions (2023-2034) (\$MN)

Table 4 Global Telecom Cloud Native Market Outlook, By Containerized Network Functions (2023-2034) (\$MN)

Table 5 Global Telecom Cloud Native Market Outlook, By Service Mesh Solutions (2023-2034) (\$MN)

Table 6 Global Telecom Cloud Native Market Outlook, By Cloud-Native Orchestration (2023-2034) (\$MN)

Table 7 Global Telecom Cloud Native Market Outlook, By Network Automation Platforms (2023-2034) (\$MN)

Table 8 Global Telecom Cloud Native Market Outlook, By Services (2023-2034) (\$MN)

Table 9 Global Telecom Cloud Native Market Outlook, By Professional Services (2023-2034) (\$MN)

Table 10 Global Telecom Cloud Native Market Outlook, By Managed Services (2023-2034) (\$MN)

Table 11 Global Telecom Cloud Native Market Outlook, By Consulting & Integration Services (2023-2034) (\$MN)

Table 12 Global Telecom Cloud Native Market Outlook, By Deployment Model (2023-2034) (\$MN)

Table 13 Global Telecom Cloud Native Market Outlook, By Public Cloud (2023-2034) (\$MN)

Table 14 Global Telecom Cloud Native Market Outlook, By Single-Cloud Deployment (2023-2034) (\$MN)

Table 15 Global Telecom Cloud Native Market Outlook, By Multi-Cloud Deployment (2023-2034) (\$MN)

Table 16 Global Telecom Cloud Native Market Outlook, By Private Cloud (2023-2034) (\$MN)

Table 17 Global Telecom Cloud Native Market Outlook, By On-Premises Cloud (2023-2034) (\$MN)

Table 18 Global Telecom Cloud Native Market Outlook, By Hosted Private Cloud (2023-2034) (\$MN)

Table 19 Global Telecom Cloud Native Market Outlook, By Hybrid Cloud (2023-2034) (\$MN)

Table 20 Global Telecom Cloud Native Market Outlook, By Network Function (2023-2034) (\$MN)

Table 21 Global Telecom Cloud Native Market Outlook, By Core Network (2023-2034) (\$MN)

Table 22 Global Telecom Cloud Native Market Outlook, By RAN Functions (2023-2034) (\$MN)

Table 23 Global Telecom Cloud Native Market Outlook, By OSS/BSS Applications (2023-2034) (\$MN)

Table 24 Global Telecom Cloud Native Market Outlook, By Content Delivery Network (2023-2034) (\$MN)

Table 25 Global Telecom Cloud Native Market Outlook, By Network Security (2023-2034) (\$MN)

Table 26 Global Telecom Cloud Native Market Outlook, By Edge Computing (2023-2034) (\$MN)

Table 27 Global Telecom Cloud Native Market Outlook, By Network Analytics (2023-2034) (\$MN)

Table 28 Global Telecom Cloud Native Market Outlook, By Organization Size (2023-2034) (\$MN)

Table 29 Global Telecom Cloud Native Market Outlook, By Large Enterprises (2023-2034) (\$MN)

Table 30 Global Telecom Cloud Native Market Outlook, By Small & Medium Enterprises (2023-2034) (\$MN)

Table 31 Global Telecom Cloud Native Market Outlook, By Telecom Startups & MVNOs (2023-2034) (\$MN)

Table 32 Global Telecom Cloud Native Market Outlook, By Application (2023-2034) (\$MN)

Table 33 Global Telecom Cloud Native Market Outlook, By 5G Core Deployment (2023-2034) (\$MN)

Table 34 Global Telecom Cloud Native Market Outlook, By Virtualized Network Infrastructure (2023-2034) (\$MN)

Table 35 Global Telecom Cloud Native Market Outlook, By Network Slicing (2023-2034) (\$MN)

Table 36 Global Telecom Cloud Native Market Outlook, By IoT Connectivity Management (2023-2034) (\$MN)

Table 37 Global Telecom Cloud Native Market Outlook, By Real-Time Analytics (2023-2034) (\$MN)

Table 38 Global Telecom Cloud Native Market Outlook, By Cloud-Native OSS/BSS Transformation (2023-2034) (\$MN)

Table 39 Global Telecom Cloud Native Market Outlook, By Edge Service Enablement

(2023-2034) (\$MN)

Table 40 Global Telecom Cloud Native Market Outlook, By End User (2023-2034) (\$MN)

Table 41 Global Telecom Cloud Native Market Outlook, By Telecom Operators (2023-2034) (\$MN)

Table 42 Global Telecom Cloud Native Market Outlook, By Cloud Service Providers (2023-2034) (\$MN)

Table 43 Global Telecom Cloud Native Market Outlook, By Enterprises (2023-2034) (\$MN)

Table 44 Global Telecom Cloud Native Market Outlook, By Government & Defense (2023-2034) (\$MN)

Table 45 Global Telecom Cloud Native Market Outlook, By Media & Entertainment (2023-2034) (\$MN)

Table 46 Global Telecom Cloud Native Market Outlook, By Industrial Enterprises (2023-2034) (\$MN)

Table 47 Global Telecom Cloud Native Market Outlook, By Smart City Operators (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: Telecom Cloud Native Market Forecasts to 2034 – Global Analysis By Component (Solutions, Services), Deployment Model, Network Function, Organization Size, Application, End User and By Geography

Product link: <https://marketpublishers.com/r/TB185A65BE00EN.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/TB185A65BE00EN.html>