

Global Telecom Cloud Market by Component (Solution, Services (Professional Services, Managed Services)), By Deployment Mode (Private, Public, Hybrid), By Organization Size (SMEs, Large Enterprises), By Service Model (Software as a Service (SaaS), Platform as a Service (PaaS), Infrastructure as a Service (IaaS)), By Application (Networking, Data Storage & Computing, Traffic Management, Cloud Migration, Others), By Region, Competition, 2018-2028

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Abstracts

The global telecom cloud market was valued at USD 25.73 billion by the end of 2022, with a compound annual growth rate (CAGR) of 17.13% during the forecast period. The global telecom cloud market represents the fusion of telecommunications and cloud computing, revolutionizing communication services. Telecom Cloud utilizes cloud technologies to deliver a range of communication services, from voice communication to multimedia streaming, over the internet. This convergence addresses the escalating demand for seamless, scalable, and innovative communication solutions. Telecom Cloud empowers operators, service providers, and enterprises to enhance their service offerings, accelerate 5G network deployment, and streamline operations. With a spectrum of deployment models including public, private, and hybrid clouds, the Telecom Cloud market is a transformative force shaping the future of communication networks and enabling digital transformation across industries.

Key Market Drivers

5G Network Expansion and Adoption

The rapid expansion and adoption of 5G networks are driving the dynamic growth of the global Telecom Cloud market. 5G, the fifth generation of wireless technology, represents a seismic shift in the telecommunications landscape, offering vastly superior data speeds, exceptionally low latency, and significantly enhanced network capacity compared to its predecessors. This transformative technology is not merely an evolution; it is a revolution that is reshaping how we connect, communicate, and conduct business. At the heart of this revolution is the intersection of 5G and telecom cloud solutions. Telecom cloud infrastructure provides the critical foundation for the efficient deployment and management of 5G networks. 5G's network densification, which relies on a dense network of small cells, demands advanced orchestration and resource allocation capabilities, precisely what Telecom Cloud delivers. Moreover, 5G's low latency capabilities, essential for applications such as autonomous vehicles and augmented reality, are made feasible through edge computing, a realm where Telecom Cloud plays a pivotal role. The concept of network slicing, another 5G innovation, relies on telecom cloud's flexibility to create multiple virtual networks within a single physical infrastructure, each customized to meet the specific needs of different services. Additionally, 5G's ability to connect a vast number of IoT devices is supported by telecom cloud's scalable storage and connectivity management. As the global rollout of 5G networks continues, the Telecom Cloud market is poised for remarkable expansion. Telecom operators and enterprises alike are recognizing that Telecom Cloud solutions are indispensable for harnessing the full potential of 5G technology, enabling them to offer diverse and innovative services that were once only dreams but are now becoming a reality.

Growing Demand for Edge Computing

The burgeoning demand for edge computing is emerging as a powerful catalyst propelling the growth of the global telecom cloud market. Edge computing is revolutionizing the way data is processed and applications are delivered by bringing computational capabilities closer to the data source, reducing latency, and enabling real-time processing. This paradigm shift is particularly significant in an era driven by data-intensive and latency-sensitive applications like autonomous vehicles, industrial automation, and augmented reality. Telecom Cloud solutions are at the forefront of enabling edge computing. The strategic placement of edge data centers, often empowered by Telecom Cloud infrastructure, reduces the physical distance that data must travel, resulting in ultra-low latency and near-instantaneous data processing. This is especially critical for applications where split-second decisions can have life-altering consequences, such as autonomous vehicles that require immediate responses to

changing road conditions. Edge computing's relevance extends across various industries, including healthcare, manufacturing, and smart cities. For example, in healthcare, edge computing facilitates real-time patient monitoring and remote surgery, while in manufacturing, it enables predictive maintenance and quality control. Telecom Cloud platforms offer the scalability, reliability, and security required to support these mission-critical edge applications.

Moreover, as the Internet of Things (IoT) continues its rapid expansion, edge computing becomes the linchpin for processing the massive amounts of data generated by IoT devices. Telecom Cloud solutions provide the necessary infrastructure to efficiently manage and analyze this data at the edge, ensuring timely insights and actions. The confluence of edge computing and Telecom Cloud not only enhances the efficiency and responsiveness of applications but also opens up new horizons for innovation. As industries increasingly embrace the potential of edge computing, the Telecom Cloud market is experiencing a surge in demand for its capabilities in supporting these distributed, low-latency workloads, positioning it at the forefront of the digital transformation sweeping across various sectors.

Rising Demand for Software-Defined Networking (SDN) and Network Function Virtualization (NFV)

The escalating demand for Software-Defined Networking (SDN) and Network Function Virtualization (NFV) is a pivotal driver propelling the growth of the global Telecom Cloud market. SDN and NFV are transformative technologies that are reshaping the traditional telecommunications landscape by decoupling network functions and services from physical hardware, introducing unprecedented levels of flexibility, scalability, and agility in network management and provisioning. Telecom Cloud solutions play an instrumental role in facilitating the deployment and management of SDN and NFV architectures. SDN, which centralizes network control and enables dynamic resource allocation, relies on the virtualization capabilities provided by Telecom Cloud platforms. These platforms host the necessary network controllers and orchestrators, allowing operators to optimize network performance, reduce operational costs, and streamline network provisioning.

NFV, on the other hand, virtualizes network functions like firewalls, routers, and load balancers, making them more agile and cost-effective. Telecom Cloud infrastructure becomes the foundation upon which these virtualized network functions (VNFs) are deployed and managed. Telecom operators can dynamically instantiate, scale, and migrate VNFs as needed, responding to changing network demands and customer requirements. The convergence of SDN, NFV, and Telecom Cloud is driving network

transformation at an unprecedented pace. Operators are transitioning from legacy, hardware-centric infrastructures to more agile, software-driven networks. This transformation not only enhances network efficiency but also accelerates the introduction of new services, enabling operators to meet the evolving demands of consumers and enterprises in the digital age.

Additionally, as telecom operators strive to optimize their networks for next-generation technologies like 5G and edge computing, the adoption of SDN and NFV becomes imperative. These technologies enable the dynamic allocation of resources and the efficient management of network slices, which are essential for delivering diverse services and meeting stringent quality of service (QoS) requirements. In summary, the rising demand for SDN and NFV technologies is driving the Telecom Cloud market forward, as these technologies are inseparable from the cloud-based infrastructure and orchestration capabilities required to support them. As operators continue their journey towards more agile, software-defined networks, Telecom Cloud solutions are poised to play an increasingly vital role in shaping the future of telecommunications.

Data Explosion and IoT Growth

The explosive growth of data and the proliferation of Internet of Things (IoT) devices are acting as powerful engines propelling the expansion of the global Telecom Cloud market. The modern world is awash with data, driven by an ever-increasing number of IoT devices, which are embedding connectivity into everyday objects, from smart appliances and wearables to industrial sensors and autonomous vehicles. This data explosion presents a twofold challenge and opportunity for the telecommunications industry. Firstly, Telecom Cloud solutions are pivotal in managing and processing this unprecedented volume of data efficiently and securely. IoT devices generate vast streams of data that need to be collected, transmitted, stored, and analyzed in real-time. Telecom Cloud infrastructure provides the scalability and flexibility needed to handle these massive datasets. Moreover, cloud-based edge computing, often facilitated by Telecom Cloud, enables data processing closer to the source, reducing latency and enhancing the responsiveness of IoT applications.

Secondly, Telecom Cloud plays a central role in connecting and orchestrating the myriad IoT devices that make up the Internet of Things. Telecom operators rely on cloud-based platforms to manage the connectivity of these devices, ensuring seamless communication and control. These platforms provide essential features like device onboarding, data aggregation, security, and device management, all of which are critical for IoT deployments across industries. The growth of IoT is not limited to consumer

gadgets; it extends to industrial IoT (IIoT) applications, smart cities, agriculture, healthcare, and more. Each of these sectors leverages Telecom Cloud to harness the data generated by IoT devices, unlocking valuable insights, and enabling innovative services. As the data explosion continues and IoT deployments become increasingly sophisticated, the Telecom Cloud market is poised for substantial growth. Telecom operators and enterprises recognize the indispensable role of Telecom Cloud solutions in managing, analyzing, and monetizing the deluge of data from IoT devices. This convergence of data driven IoT growth and Telecom Cloud capabilities is reshaping the telecommunications landscape, ushering in a new era of connectivity, innovation, and efficiency.

Key Market Challenges

Data Security and Privacy Concerns

One of the foremost challenges facing the global Telecom Cloud market revolves around data security and privacy concerns. As the telecom industry increasingly embraces cloud-based solutions to deliver communication services, sensitive and valuable data becomes susceptible to security breaches, unauthorized access, and cyberattacks. The intricate nature of communication networks involves the transmission and storage of personal, financial, and confidential information. A breach in the security of such data could lead to severe consequences, including financial losses, reputational damage, and regulatory penalties. Moreover, data privacy regulations such as the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA) impose stringent requirements on the collection, storage, and processing of personal data. Adhering to these regulations while leveraging Telecom Cloud solutions presents a complex challenge, necessitating robust encryption, identity and access management, and continuous monitoring to safeguard sensitive information.

Network Latency and Quality of Service

Another significant challenge facing the global Telecom Cloud market pertains to network latency and ensuring quality of service. As communication services increasingly rely on cloud infrastructure, the distance between users and data centers can introduce latency, impacting the responsiveness of real-time applications such as video conferencing, online gaming, and IoT devices. Latency-sensitive applications demand minimal delays to ensure a seamless user experience. Additionally, ensuring consistent and reliable quality of service becomes crucial to maintaining customer satisfaction and loyalty. Achieving low-latency communication and guaranteed quality of service requires

optimizing network architectures, deploying edge computing solutions, and implementing traffic prioritization mechanisms. Balancing the need for scalable and cost-effective cloud solutions with the demand for low latency and high-quality communication poses a technical and operational challenge for operators and service providers as they navigate the intricacies of the Telecom Cloud landscape.

Key Market Trends

Network Function Virtualization (NFV) and Software-Defined Networking (SDN) Integration

A prominent trend shaping the global Telecom Cloud market is the increasing integration of Network Function Virtualization (NFV) and Software-Defined Networking (SDN). NFV involves virtualizing network functions traditionally performed by hardware, such as routers and firewalls, and running them as software on standard servers. SDN, on the other hand, centralizes network control and allows for dynamic management and orchestration of network resources. The convergence of Telecom Cloud with NFV and SDN enables operators and service providers to create agile, adaptable, and automated network environments. This integration streamlines network management, enhances scalability, and reduces operational costs. Moreover, NFV and SDN facilitate the rapid deployment of new services and enable the creation of virtualized network slices tailored to specific user requirements, ultimately fostering innovation and personalized services within the Telecom Cloud ecosystem.

Edge Computing and Multi-Access Edge Computing (MEC)

The emergence of edge computing and Multi-Access Edge Computing (MEC) is a transformative trend influencing the global Telecom Cloud market. As data-intensive applications, IoT devices, and real-time services proliferate, the demand for low-latency and high-speed processing at the network edge grows. Edge computing brings computation and data storage closer to the data source, reducing latency and enhancing the user experience. MEC takes this concept a step further by deploying cloud services at the edge of the network. Telecom Cloud solutions, when integrated with edge computing and MEC, enable operators to offer localized processing, real-time analytics, and efficient content delivery. This trend holds tremendous potential for innovative applications such as augmented reality, autonomous vehicles, and smart cities, where real-time responsiveness is critical. The Telecom Cloud market's alignment with edge computing underscores its adaptability to evolving technological landscapes and its role in enabling cutting-edge digital experiences.

Hybrid and Multi-Cloud Strategies

Hybrid and multi-cloud strategies are gaining traction as a significant trend within the global Telecom Cloud market. Enterprises and service providers are adopting hybrid cloud architectures, combining on-premises infrastructure with public and private cloud resources. This approach offers the flexibility to balance workload requirements, data security, and cost considerations. In parallel, multi-cloud strategies involve leveraging multiple cloud service providers to avoid vendor lock-in and enhance redundancy. Telecom Cloud solutions, when designed to integrate seamlessly with diverse cloud environments, allow operators to deploy hybrid and multi-cloud approaches effectively. This trend aligns with the growing need for flexibility, disaster recovery, and compliance adherence, as different workloads and applications can be optimized for specific cloud environments. As the Telecom Cloud market evolves, its ability to support hybrid and multi-cloud strategies becomes essential in meeting the diverse needs of enterprises and service providers navigating complex cloud landscapes.

Segmental Insights

Deployment Mode Insights

Based on deployment mode, the private segment emerges as the predominant segment, exhibiting unwavering dominance projected throughout the forecast period. The private deployment mode encapsulates a strategic approach wherein telecommunication operators, service providers, and enterprises opt for dedicated and isolated cloud environments. This preference for exclusivity and heightened control resonates particularly in sectors with stringent data security and regulatory requirements. The private segment's dominance reflects the priority placed on safeguarding sensitive information, maintaining customized configurations, and ensuring optimal performance. As industries across the spectrum increasingly adopt Telecom Cloud solutions to transform their communication services, the private deployment mode's steadfast prominence signifies its instrumental role in shaping the market's trajectory while offering a tailored, secure, and resilient platform for innovative service delivery.

Application Insights

Based on application, the networking, data storage & computing segment emerges as a formidable frontrunner, exerting its dominance and shaping the market's trajectory

throughout the forecast period. This segment encompasses a pivotal role in providing the fundamental building blocks for modern communication services. As the demand for seamless connectivity, efficient data storage, and robust computing capabilities grows, the networking, data storage & computing segment gains prominence. It caters to the critical infrastructure required to support the communication industry's evolution, enabling telecommunication operators, service providers, and enterprises to deliver high-performance services. With the advent of 5G networks, IoT applications, and data-intensive services, the segment's dominance underscores its essential role in shaping the market landscape by fostering innovation, enhancing user experiences, and facilitating the digital transformation journey across industries.

Regional Insights

North America firmly establishes itself as a commanding presence within the global telecom cloud market, affirming its preeminent position, and highlighting its pivotal role in shaping the industry's course. With a robust technological landscape, thriving telecommunication sector, and a culture of innovation, North America stands at the forefront of Telecom Cloud adoption and advancement. The region's commitment to pushing the boundaries of communication services, coupled with its embrace of cloud technologies, positions it as a frontrunner in driving the evolution of the industry. As North America continues to pave the way for 5G deployments, edge computing, and digital transformation initiatives, its influence resonates globally, reinforcing its stature as a commanding force that steers the direction of the Telecom Cloud market and plays a central role in shaping the future of communication networks and services.

Key Market Players

AT&T Inc.

BT Group PLC

Verizon Communications Inc.

Telstra Corporation Ltd

Telefonaktiebolaget LM Ericsson

Deutsche Telekom

NTT Communications Corporation

CenturyLink Inc

Singapore Telecommunications Limited

China Telecommunications Corporation

Report Scope:

In this report, the global telecom cloud market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Telecom Cloud Market, By Component:

Solution

Services

Professional Services

Managed Services

Global Telecom Cloud Market, By Deployment Mode:

Private

Public

Hybrid

Global Telecom Cloud Market, By Organization Size:

SMEs

Large Enterprises

Global Telecom Cloud Market, By Service Model:

Software as a Service (SaaS)

Platform as a Service (PaaS)

Infrastructure as a Service (IaaS)

Global Telecom Cloud Market, By Application:

Networking

Data Storage & Computing

Traffic Management

Cloud Migration

Others

Global Telecom Cloud Market, By Region:

North America

Europe

South America

Middle East & Africa

Asia Pacific

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Telecom Cloud Market.

Available Customizations:

Global Telecom Cloud market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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13.2. Challenges

14. MARKET TRENDS AND DEVELOPMENTS

15. COMPANY PROFILES

15.1. AT&T Inc.

15.1.1. Business Overview

15.1.2. Key Financials & Revenue

15.1.3. Key Contact Person

15.1.4. Headquarters Address

15.1.5. Key Product/Service Offered

15.2. BT Group PLC

15.2.1. Business Overview

15.2.2. Key Financials & Revenue

15.2.3. Key Contact Person

15.2.4. Headquarters Address

15.2.5. Key Product/Service Offered

15.3. Verizon Communications Inc.

15.3.1. Business Overview

15.3.2. Key Financials & Revenue

15.3.3. Key Contact Person

15.3.4. Headquarters Address

15.3.5. Key Product/Service Offered

15.4. Telstra Corporation Ltd

15.4.1. Business Overview

15.4.2. Key Financials & Revenue

15.4.3. Key Contact Person

15.4.4. Headquarters Address

15.4.5. Key Product/Service Offered

15.5. Telefonaktiebolaget LM Ericsson

15.5.1. Business Overview

15.5.2. Key Financials & Revenue

- 15.5.3. Key Contact Person
- 15.5.4. Headquarters Address
- 15.5.5. Key Product/Service Offered
- 15.6. Deutsche Telekom
 - 15.6.1. Business Overview
 - 15.6.2. Key Financials & Revenue
 - 15.6.3. Key Contact Person
 - 15.6.4. Headquarters Address
 - 15.6.5. Key Product/Service Offered
- 15.7. NTT Communications Corporation
 - 15.7.1. Business Overview
 - 15.7.2. Key Financials & Revenue
 - 15.7.3. Key Contact Person
 - 15.7.4. Headquarters Address
 - 15.7.5. Key Product/Service Offered
- 15.8. CenturyLink Inc
 - 15.8.1. Business Overview
 - 15.8.2. Key Financials & Revenue
 - 15.8.3. Key Contact Person
 - 15.8.4. Headquarters Address
 - 15.8.5. Key Product/Service Offered
- 15.9. Singapore Telecommunications Limited
 - 15.9.1. Business Overview
 - 15.9.2. Key Financials & Revenue
 - 15.9.3. Key Contact Person
 - 15.9.4. Headquarters Address
 - 15.9.5. Key Product/Service Offered
- 15.10. China Telecommunications Corporation
 - 15.10.1. Business Overview
 - 15.10.2. Key Financials & Revenue
 - 15.10.3. Key Contact Person
 - 15.10.4. Headquarters Address
 - 15.10.5. Key Product/Service Offered

16. STRATEGIC RECOMMENDATIONS

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