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OpenStack Services Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Deployment (On-Cloud, On-Premise), By Organization Size (Small & Medium Enterprises, Large Enterprises), By Industry Vertical (BFSI, Manufacturing, IT & Telecom, Others), By Region & Competition, 2021-2031F

https://marketpublishers.com/r/O191F1A434ECEN.html
Date: January 2026
Pages: 180
Price: US$ 4,500.00 (Single User License)
ID: O191F1A434ECEN

Abstracts

The Global OpenStack Services Market is projected to expand significantly, rising from USD 30.23 Billion in 2025 to USD 106.69 Billion by 2031, reflecting a compound annual growth rate of 23.39%. As an open-source cloud operating system, OpenStack enables the centralized management of extensive compute, storage, and networking resources, acting as a critical foundation for both private and public cloud infrastructures. Market growth is primarily fueled by a strategic push toward digital sovereignty and the urgent need for organizations to escape the escalating costs associated with proprietary virtualization licensing. Furthermore, the platform's capacity to support data-heavy artificial intelligence and machine learning workloads is notably accelerating its adoption within the enterprise and telecommunications sectors.

However, the growth of these services is often constrained by the operational intricacies of architecting and maintaining the platform, which require specialized engineering skills that are frequently in short supply. This talent scarcity can delay rapid deployment and increase long-term management expenses for businesses. Despite these challenges, the scale of adoption remains impressive; according to the OpenInfra Foundation, global OpenStack deployments were estimated to surpass 55 million cores in production in 2025.

Market Driver

The transition from proprietary virtualization platforms to open-source alternatives is fundamentally transforming the Global OpenStack Services Market. Driven by major shifts in licensing models by dominant proprietary vendors, enterprises are actively seeking to reduce rising operational costs and eliminate vendor lock-in. This migration necessitates extensive consulting, re-architecting, and migration services to move legacy workloads into open environments. According to the OpenInfra Foundation's March 2025 report, 'From VMware to OpenStack: Why Open Source is Winning the Virtualization Battle,' over 80% of member organizations reported receiving inquiries regarding migrating workloads from VMware to OpenStack, underscoring the critical demand for specialized providers to ensure data integrity and minimize downtime during these platform switches.

Concurrently, the expansion of Network Functions Virtualization (NFV) for 5G telecommunications serves as a secondary growth engine. Telecom operators are increasingly utilizing OpenStack services to manage the distributed, virtualized infrastructure essential for low-latency connectivity. This trend is exemplified by the BT Group's deployment, which, as noted in a June 2025 Canonical case study, successfully scaled to support 5G coverage for over 75% of the UK population. Furthermore, the financial efficiency of open architectures supports this growth; an OpenMetal article from November 2025 states that deploying OpenStack can reduce IT capital and operational costs by up to 60%, thereby driving long-term service contracts.

Market Challenge

A significant hurdle facing the Global OpenStack Services Market is the acute shortage of specialized engineering talent needed to navigate the platform's operational complexity. OpenStack's architecture requires deep technical expertise for effective deployment, customization, and ongoing maintenance, creating a substantial barrier for organizations lacking dedicated, highly skilled teams. This scarcity of qualified professionals directly hampers market growth by causing significant delays in project timelines and increasing the risk of architectural errors during implementation. Consequently, many organizations are reluctant to scale their adoption or are compelled to incur premium costs for external consultants, effectively slowing the broader expansion of these services across enterprise sectors.

The severity of this skills gap is reinforced by recent industry data illustrating the disparity between organizational needs and available workforce capabilities. According to the Linux Foundation, in 2024, 64% of technology leaders acknowledged a lack of essential skills or experience in candidates, with cloud computing identified as the highest priority area for staffing. This data highlights a critical friction point where the limited availability of competent engineers restricts the ability of service providers and enterprises to fully leverage OpenStack?s capabilities, thereby capping the market?s immediate growth trajectory.

Market Trends

The increasing adoption of OpenStack for AI and High-Performance Computing workloads is accelerating as organizations seek scalable, cost-effective infrastructure for data-intensive applications. In contrast to proprietary public clouds, which can impose prohibitive costs for large-scale model training, OpenStack offers a private, customizable environment that efficiently manages GPU resources and high-throughput networking. This trend involves deploying AI toolkits directly onto open infrastructure to ensure data proximity and performance control. As reported by Canonical in November 2025, in the '83% of organizations see value in adopting open source' report, the adoption of open-source AI and machine learning applications has risen from 35% to 40% since 2024, reflecting the platform's critical role in supporting these demanding workloads.

Simultaneously, the growth of Managed OpenStack Private Cloud Services is emerging as a vital strategy to bridge the widening engineering skills gap. While the platform provides robust capabilities, its architectural complexity often overwhelms internal IT teams, prompting a shift toward consumption-based managed models where third-party experts handle operations, upgrades, and security. This approach allows businesses to leverage OpenStack?s benefits without the burden of maintaining the underlying stack, effectively democratizing access to private cloud infrastructure. The financial impact of this trend is evident; according to a June 2025 Linuxiac article, Canonical's subscription revenue reached $235 million, representing a 19% year-over-year increase driven largely by enterprise managed services.

Key Market Players

%li%IBM Corporation

%li%Oracle Corporation

%li%Hewlett Packard Enterprise Company

%li%Red Hat, Inc

%li%Canonical Group Limited

%li%Mirantis, Inc

%li%Cisco Systems, Inc

%li%Rackspace Technology Global, Inc

%li%Broadcom, Inc

%li%Cloudify, Inc

Report Scope

In this report, the Global OpenStack Services Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

%li%OpenStack Services Market, By Deployment

%li%%li%On-Cloud

%li%%li%On-Premise

%li%OpenStack Services Market, By Organization Size

%li%%li%Small & Medium Enterprises

%li%%li%Large Enterprises

%li%OpenStack Services Market, By Industry Vertical

%li%%li%BFSI

%li%%li%Manufacturing

%li%%li%IT & Telecom

%li%%li%Others

%li%OpenStack Services Market, By Region

%li%%li%North America

%li%%li%%li%United States

%li%%li%%li%Canada

%li%%li%%li%Mexico

%li%%li%Europe

%li%%li%%li%France

%li%%li%%li%United Kingdom

%li%%li%%li%Italy

%li%%li%%li%Germany

%li%%li%%li%Spain

%li%%li%Asia Pacific

%li%%li%%li%China

%li%%li%%li%India

%li%%li%%li%Japan

%li%%li%%li%Australia

%li%%li%%li%South Korea

%li%%li%South America

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%li%%li%%li%Brazil

%li%%li%%li%Argentina

%li%%li%%li%Colombia

%li%%li%Middle East & Africa

%li%%li%%li%South Africa

%li%%li%%li%Saudi Arabia

%li%%li%%li%UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global OpenStack Services Market.

Available Customizations:

Global OpenStack Services Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

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

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