

Europe Telecom Cloud Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Component (Solution and Services), Deployment (Public Cloud, Private Cloud, and Hybrid Cloud), Service Model (Software-as-a-Service, Infrastructure-as-a-Service, and Platform-as-a-Service), and End User (SMEs and Large Enterprises)

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Abstracts

The Europe Telecom Cloud Market is poised for significant growth, projected to reach approximately US\$ 20,208.8 million by 2031, up from US\$ 4,864.0 million in 2024. This growth trajectory indicates a robust compound annual growth rate (CAGR) of 22.7% from 2025 to 2031, reflecting the increasing adoption of cloud technologies within the telecom sector.

Market Overview and Key Developments

The market is primarily segmented into key countries including Germany, France, Italy, the UK, Russia, and the Rest of Europe. Notable developments in the industry highlight a strong trend towards cloudification. For instance, in 2023, Deutsche Telekom announced its involvement in an edge-cloud infrastructure project, emphasizing the industry's commitment to enhancing network capabilities through distributed computing. In a groundbreaking move in 2024, Telefonica Germany transitioned its 5G core network to Amazon Web Services (AWS) cloud, marking a significant milestone as the first mobile operator to migrate its core network to a public cloud provider. This transition is part of Telefonica's broader strategy to leverage quantum technologies in

collaboration with AWS, aimed at optimizing mobile network performance and preparing for future 6G advancements.

In 2025, Deutsche Telekom further solidified its cloud strategy by renewing its partnership with Google Cloud, focusing on migrating its SAP landscape to the cloud as part of its SAP2SKY initiative. Concurrently, Bouygues Telecom Business enhanced its enterprise solutions by acquiring SecInfra, a firm specializing in IT infrastructure security, thereby bolstering its cloud and cybersecurity offerings. These strategic moves reflect a broader industry trend where European telecom operators are increasingly adopting cloud technologies to improve network efficiency, scalability, and security.

Market Segmentation Insights

The Europe Telecom Cloud Market can be analyzed through various segments:

By Component: The market is divided into Solutions and Services, with Solutions holding the largest market share in 2024.

By Deployment: The segmentation includes Public Cloud, Private Cloud, and Hybrid Cloud, where Public Cloud is the dominant segment in 2024.

By Service Model: This includes Software-as-a-Service (SaaS), Infrastructure-as-a-Service (IaaS), and Platform-as-a-Service (PaaS), with SaaS leading the market share in 2024.

By End User: The market is segmented into Small and Medium Enterprises (SMEs) and Large Enterprises, with Large Enterprises capturing the largest share in 2024.

Market Drivers and Trends

The rapid adoption of 5G technology is a significant driver for the demand for cloud-based solutions in the telecom sector. Unlike previous generations, 5G networks require ultra-low latency, high bandwidth, and flexible, dynamic network architectures to support applications such as autonomous vehicles, smart cities, and real-time Internet of Things (IoT) solutions. Traditional hardware-based telecom infrastructures struggle to meet these demands, making cloud computing an essential solution. Cloud technologies enable virtualized network functions that can be deployed quickly, scaled flexibly, and

maintained with lower operational costs. This agility is crucial for telecom operators to roll out 5G services efficiently and adapt to evolving network requirements.

For example, in June 2025, Ericsson introduced Ericsson On-Demand, a cloud-native solution developed in partnership with Google Cloud. This platform offers core network services as a SaaS solution, allowing communications service providers (CSPs) to deploy core network functions rapidly, scale operations as needed, and reduce infrastructure management complexities. By leveraging Google Kubernetes Engine (GKE) and AI infrastructure, this solution provides CSPs with a fully managed, pay-as-you-use model, enabling core network deployments in minutes and offering unprecedented flexibility and cost control.

Country-Specific Insights

Germany is a key player in the Europe Telecom Cloud Market, holding the largest market share in 2024. Major telecom operators such as Deutsche Telekom, Vodafone Germany, and Telefónica Deutschland are accelerating their cloud-native strategies. In April 2025, Deutsche Telekom selected Google Cloud as its preferred partner for migrating critical business operations to the cloud, focusing on modernizing and scaling data and AI applications central to its digital transformation strategy. The collaboration aims to develop a secure, AI-enabled platform known as the One Data Ecosystem (ODE), which integrates on-premises data systems to enhance data processing efficiency while ensuring compliance with regulatory standards.

Competitive Landscape

Key players in the Telecom Cloud Market include Amazon Web Services Inc., International Business Machines Corp, Microsoft Corp, Google LLC, Verizon Communications Inc., Telefonaktiebolaget LM Ericsson, Broadcom Inc., Cisco Systems Inc., Telstra Corp. Ltd., and AT&T Inc. These companies are actively pursuing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and deliver innovative solutions to their customers.

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