

North America 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 North America Telecom Cloud Market is projected to grow significantly, reaching approximately US\$ 34,976.0 million by 2031, up from US\$ 8,689.3 million in 2024. This growth represents a compound annual growth rate (CAGR) of 22.1% from 2025 to 2031, driven by the increasing demand for advanced telecom solutions.

Executive Summary and Market Analysis

The telecom cloud market in North America is primarily segmented into three countries: the United States, Canada, and Mexico. The surge in mobile device usage, the proliferation of Internet of Things (IoT) applications, and the ongoing deployment of 5G technology are compelling telecom operators to modernize their networks. Cloud-based solutions offer the necessary agility and efficiency to meet these evolving demands. The market is further supported by a strong ecosystem of cloud service providers and technology innovators, alongside significant investments in cloud-native network functions and edge computing.

Regulatory support for network virtualization and compliance with data sovereignty laws

are also key factors driving market growth. Notably, regulatory scrutiny intensified in 2025 following a major data breach involving AT&T, which resulted in a US\$177 million settlement. This incident, which exposed the personal information of millions of customers due to unauthorized access on Snowflake's cloud platform, underscored the importance of robust security measures in cloud services.

Strategic Insights

Market Segmentation

The North America 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: It includes Public Cloud, Private Cloud, and Hybrid Cloud, where Public Cloud dominated in 2024.

By Service Model: The segments are Software-as-a-Service (SaaS), Infrastructure-as-a-Service (IaaS), and Platform-as-a-Service (PaaS), with SaaS leading the market.

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

Market Outlook

The telecom sector is experiencing rapid changes in user demands due to technological advancements and increased data consumption, alongside the rise of connected devices. Traditional network infrastructures, which often rely on fixed hardware, are struggling to keep pace with these dynamic requirements. In contrast, cloud technology provides telecom companies with scalable resources that can be adjusted on demand, allowing for efficient management of traffic spikes and seamless service expansion without significant upfront hardware investments.

The scalability of cloud-based networks enables telecom operators to dynamically allocate computing power, storage, and bandwidth as needed. This flexibility is crucial

during periods of high network traffic or when launching new services, enhancing overall network performance while reducing operational costs. Telecom providers can avoid over-provisioning and only pay for the resources they utilize. Additionally, cloud infrastructures facilitate the rapid deployment of new applications and services, enabling telecom companies to respond quickly to market changes and customer expectations.

A notable example of this trend is the partnership announced on May 22, 2025, between Tata Consultancy Services (TCS) and DNA, which aims to accelerate DNA's cloud transformation. TCS plans to migrate up to 80% of DNA's enterprise applications to the public cloud by 2030, building on a successful 17-year relationship. This collaboration is expected to enhance customer experience, improve operational efficiency, and achieve significant cost savings, illustrating how telecom companies are leveraging cloud technology to create flexible, scalable networks that can adapt to changing demands.

Country Insights

The North America Telecom Cloud Market is further segmented by country, with the United States holding the largest market share in 2024. In 2023, the US telecom industry continued its transition towards cloud technologies, with major players like AT&T, Verizon, and T-Mobile investing heavily in cloud infrastructure to improve network agility and scalability. The adoption of Network Functions Virtualization (NFV) and Software-Defined Networking (SDN) has become increasingly common, allowing telecom operators to offer more flexible and cost-effective services.

Technological innovations are pivotal in driving the industry's evolution. In 2025, significant investments were announced by major players such as AWS and Microsoft in AI-powered data centers, with AWS committing US\$11 billion for expansion in Georgia and Microsoft allocating US\$80 billion for AI infrastructure. These investments highlight the growing integration of cloud computing and artificial intelligence in transforming telecom operations.

Conclusion

The North America Telecom Cloud Market is poised for substantial growth, driven by the increasing demand for scalable and flexible network infrastructures powered by cloud technology. As telecom operators embrace cloud migration and modernization, they enhance their competitiveness in a rapidly evolving industry while delivering improved services to their customers.

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