

In partnership with:



How to build a real telco edge cloud: What every operator needs to know

STL Partners webinar

11th February 2026

STL PARTNERS

Agenda

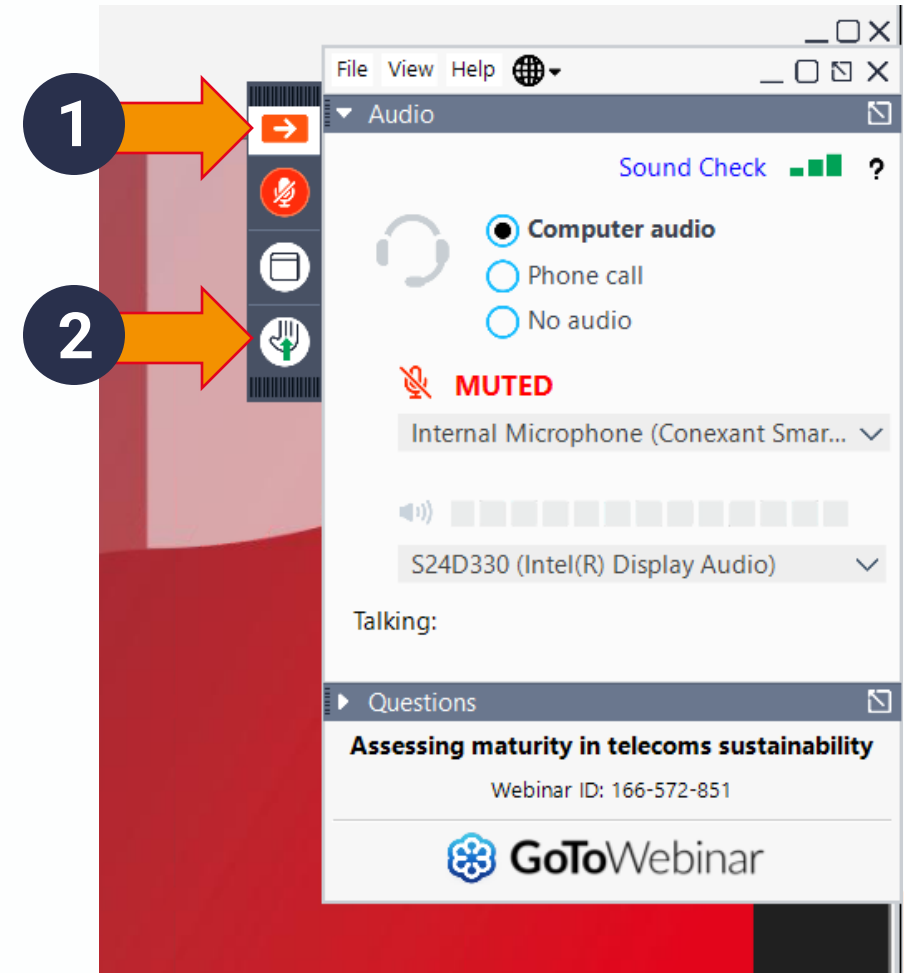
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|----------|--|---------------|
| 1 | Introduction and housekeeping | 10:00 – 10:05 |
| 2 | STL presentation - Telco edge landscape and differentiators | 10:05 – 10:20 |
| 3 | Nearby presentation - Making telco edge cloud a reality | 10:20 – 10:30 |
| 4 | Panel discussion and Q&A | 10:30 – 10:55 |
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- Feel free to type questions throughout the session for the Q&A at the end
 - Any questions that we don't answer live will be answered offline and shared in a summary Q&A document
- We'll send you the slides and a recording shortly after the session, please do share with colleagues



Our speakers



TILLY GILBERT

Director, Consulting

STL Partners



LUIS ZAS

VP of Technical Sales -
Telco

Nearby Computing



**CRISTINA SANTANA
CASILLAS**

Head of Telco Edge
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TIMO JOKIAHO

Telco Field CTO

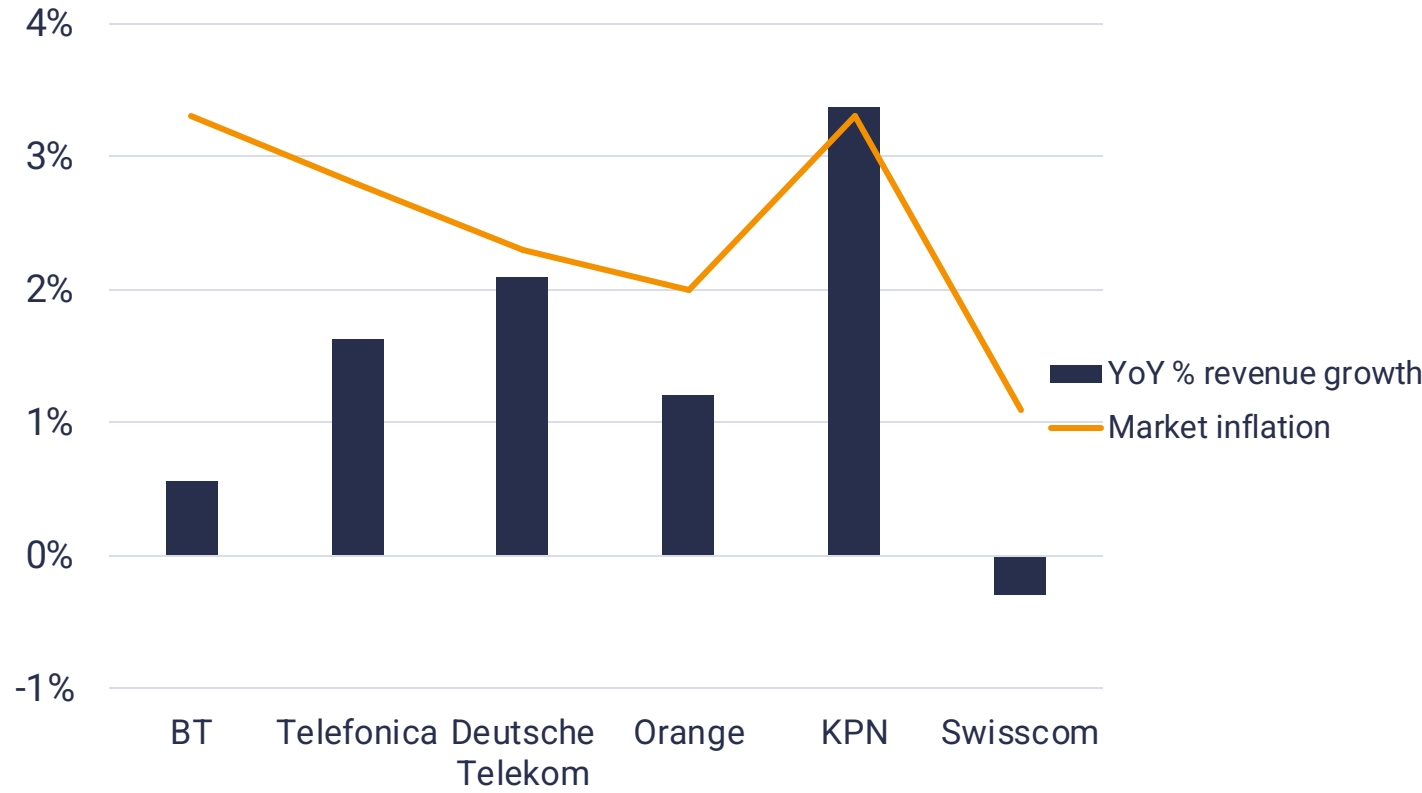
SUSE

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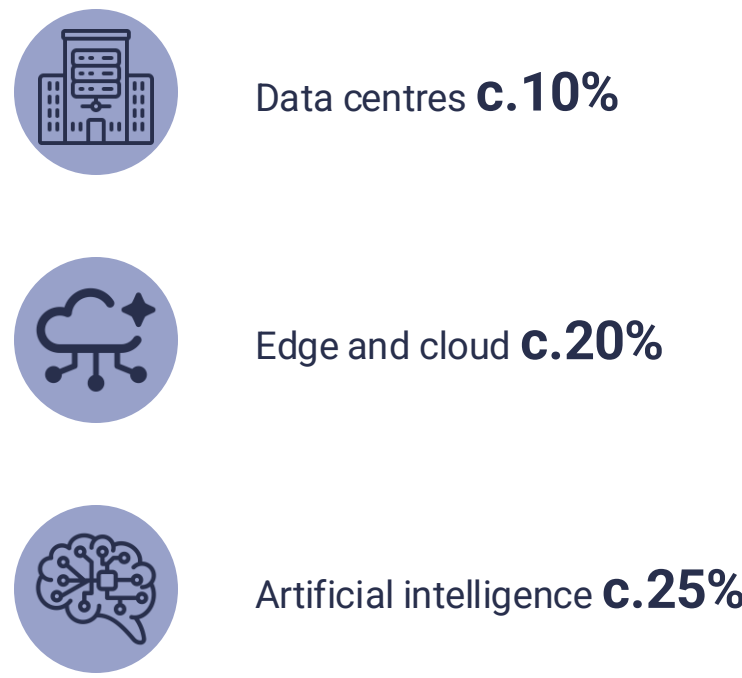
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Context: Revenues from major EMEA telcos are flat (at best), meanwhile there is strong growth in adjacent markets

2023-2024 YoY revenue growth of selected CSPs versus the inflation in their major market



Selected adjacent markets YoY revenue growth



There are pockets of success where telcos are tapping into these adjacent growth markets

Deutsche Telekom 

4% 

T System's cloud business revenue growth in 2024

 Telefónica

5% 

Telefonica's enterprise business unit revenue growth in 2024

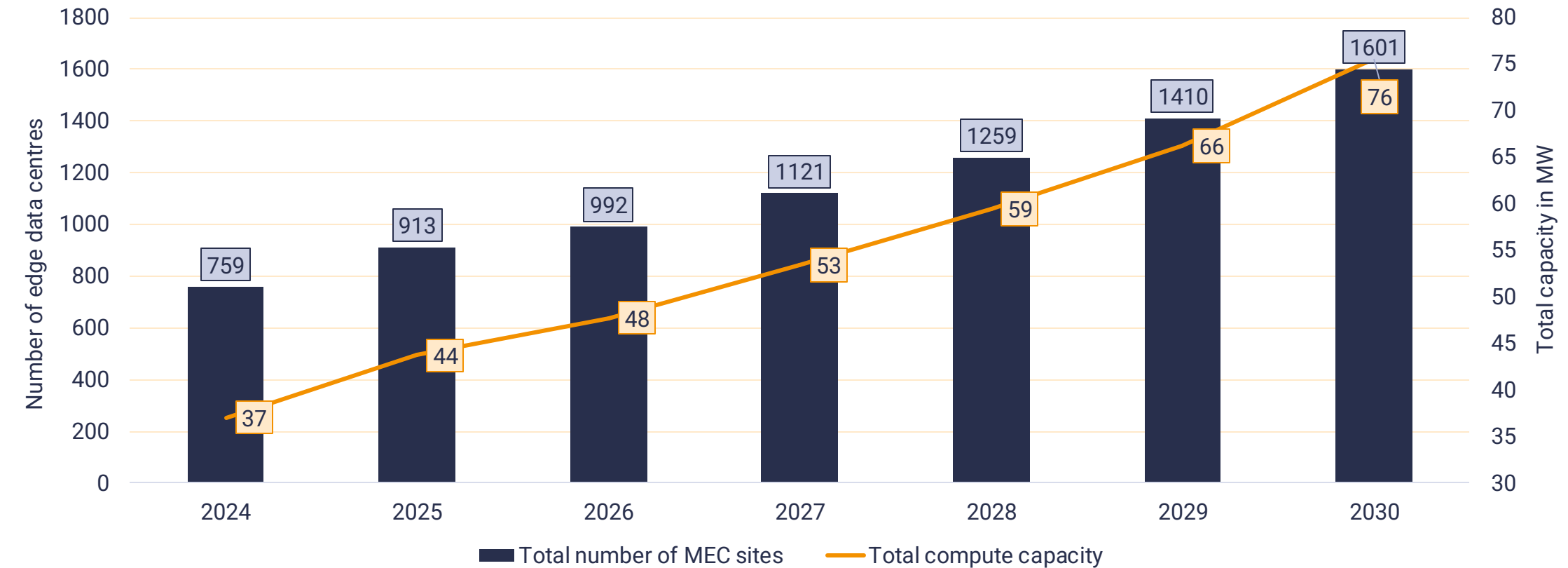
orangeTM

11% 

Orange Cyberdefense revenue growth in 2024

STL forecasts by 2030 telcos will have deployed more than 1,600 network edge sites, resulting in c. 76MW of capacity

Global network edge data centre forecast, 2024-2030 (number of data centres and capacity)



This webinar will cover four main topics

How to build a real telco edge cloud: What every operator needs to know



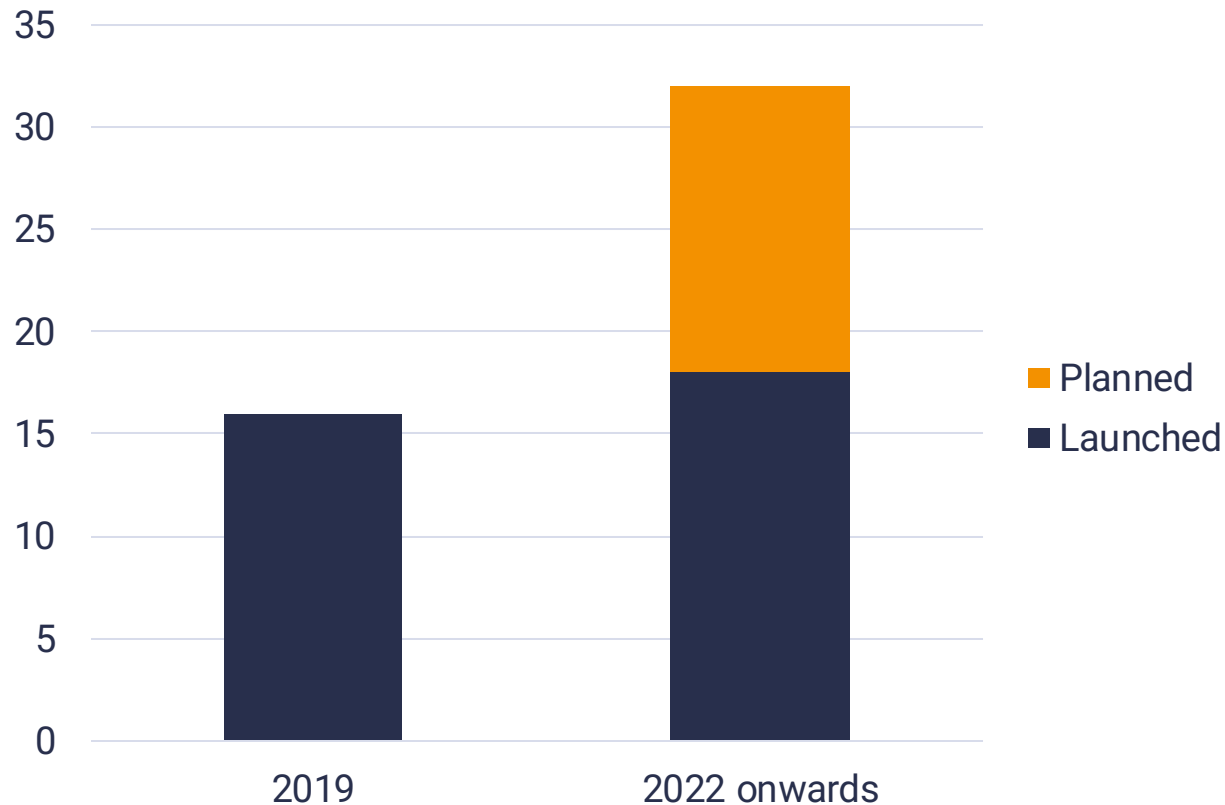
1. What is the market demand for telco edge services and how do I make sure that my investments address this demand?
2. What should my competitive differentiator as a telco be?



**What is the market demand
for network edge services
and how do I make sure that
my investments address this
demand?**

There is sustained demand for more localised compute – the hyperscalers' activity in this space demonstrates this

Evolution of AWS Local Zones



What are Azure Extended Zones?

Azure Extended Zones are small-footprint extensions of Azure placed in metros, industry centers, or a specific jurisdiction to serve low latency and data residency workloads. Azure Extended Zones supports virtual machines (VMs), containers, storage, and a selected set of Azure services and can run latency-sensitive and throughput-intensive applications close to end users and within approved data residency boundaries.

There is shifting sentiment on what is the core driver of telco edge computing deployments

2020: Edge positioning focused on latency



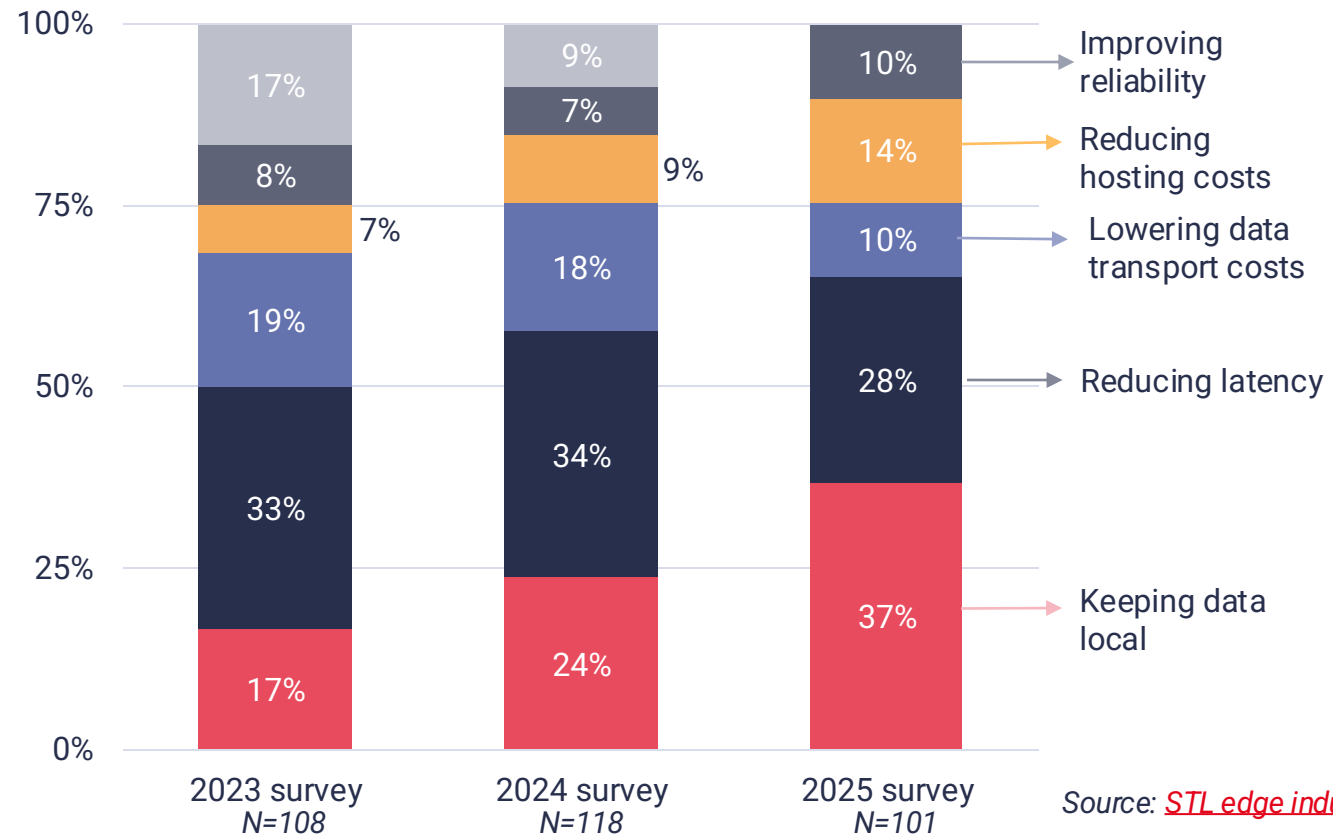
AWS re:Invent 2020

“Latency has become the new currency, and to reduce latency we need to move the required computing resources closer to the sensors, data origin or users.”

Yousef Khalidi, Corporate Vice President, Azure

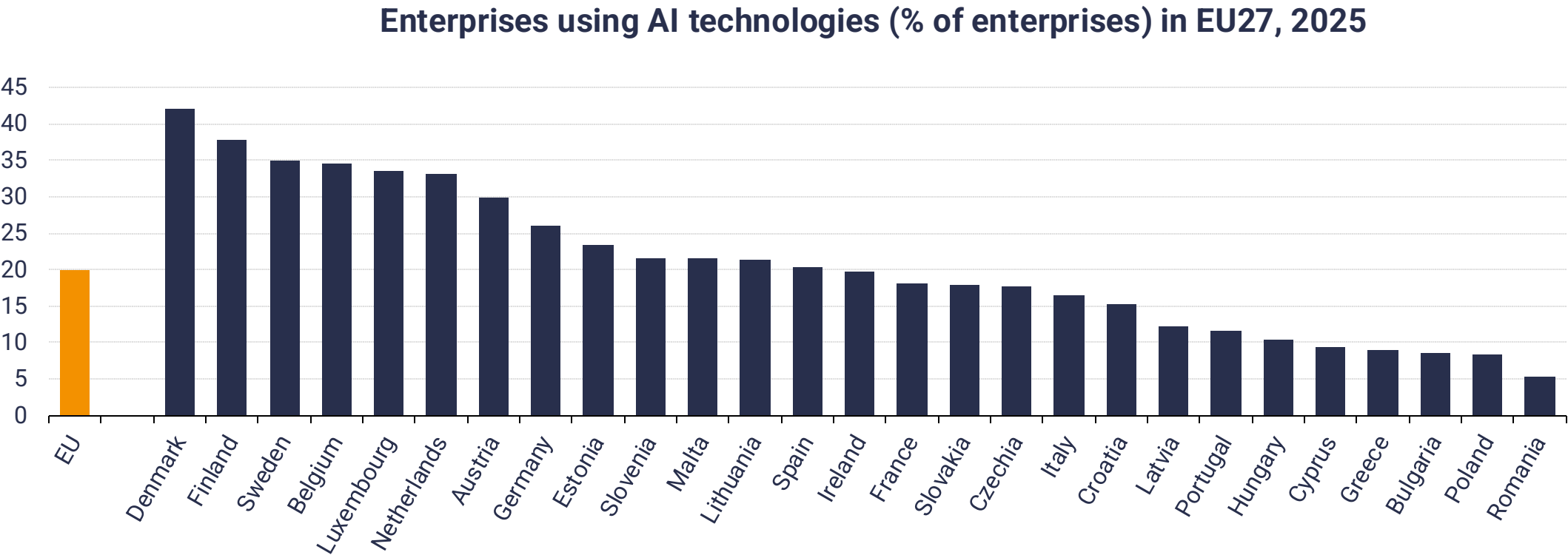
Microsoft Ignite 2019

What do you see as the main reason for customers to adopt edge computing?



Source: [STL edge industry survey](#)

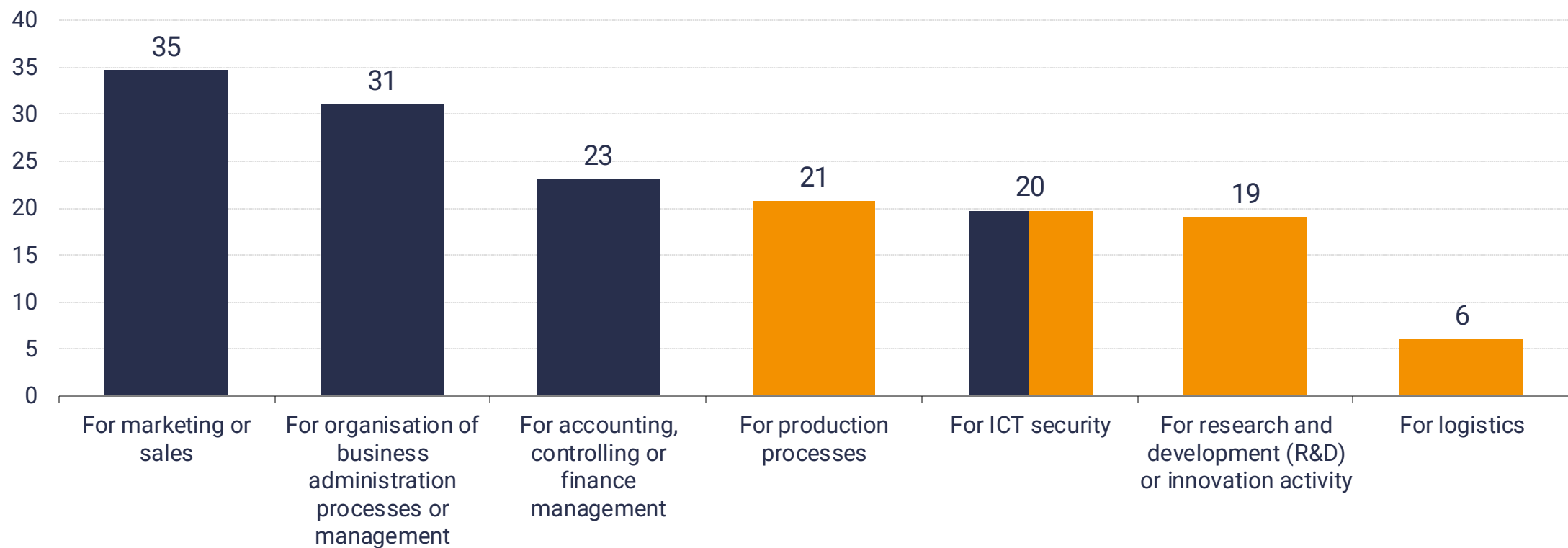
Widespread AI inferencing using proprietary enterprise data sets is expected to drive further demand for edge compute



Source: Eurostat (online data code: isoc_eb_ai)

Enterprises that have adopted AI currently use it for marketing & business processes (cloud-based) over production or R&D (potentially require edge)

Enterprises using AI technologies by type of purpose in EU27, 2025



Source: Eurostat (online data code: isoc_eb_ai)



**What should my competitive
differentiator as a telco be?**

When does latency drive the deployment of edge AI, and when doesn't it?

Industry stakeholders are enthused by edge-enabled low latency inferencing

Edge computing and AI are the perfect match, enabling breakthroughs in industries that require **real-time** processing and decision-making.

Jensen Huang, President and CEO, Nvidia



The future of AI will be decentralised, **low latency** and hyper efficient, and that's why Dell is pioneering the edge AI revolution.

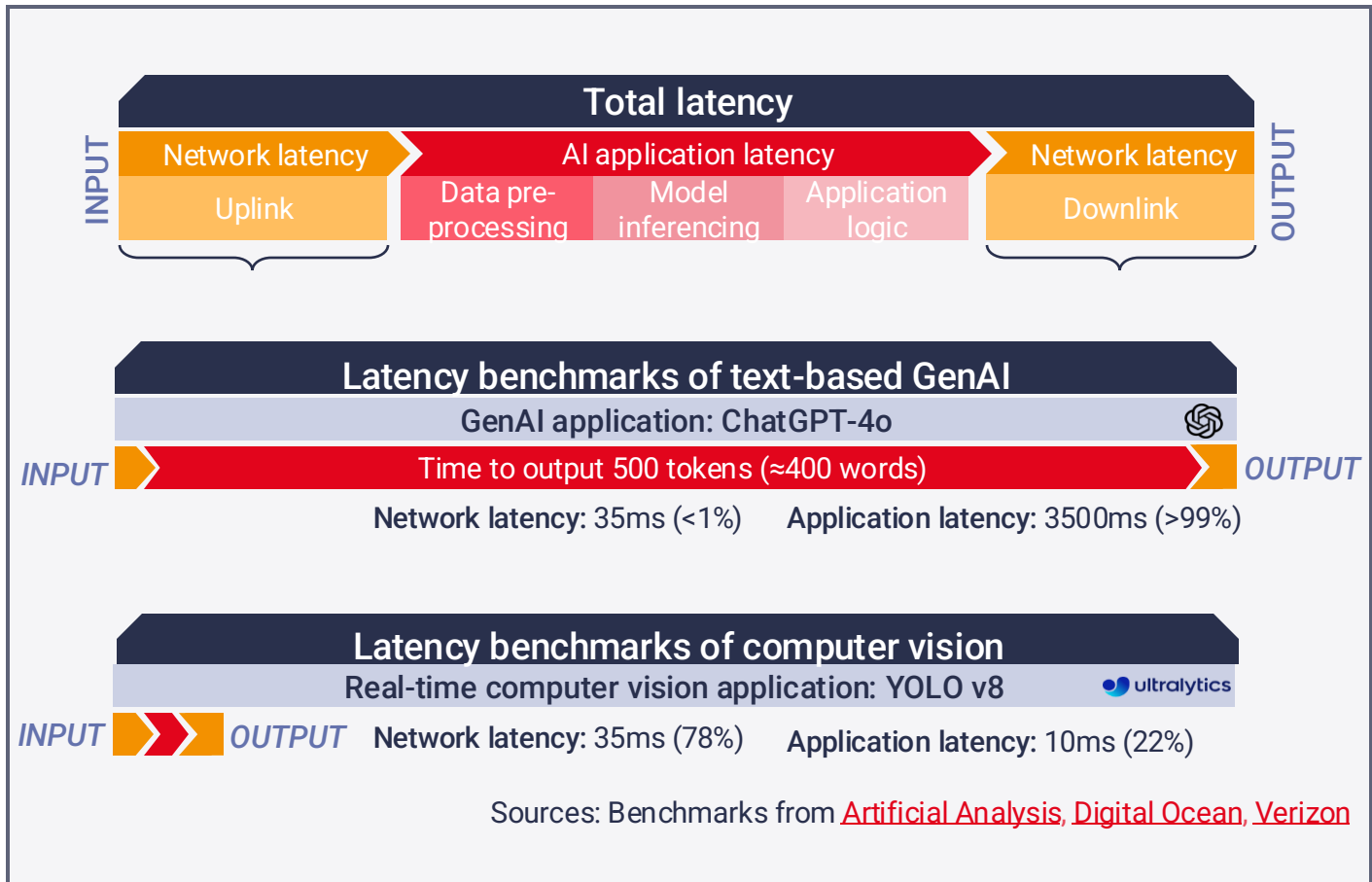
Michael Dell, Founder, Chairman and CEO, Dell

Speed of inference will depend on hybrid infrastructure that brings data closer to the edge.

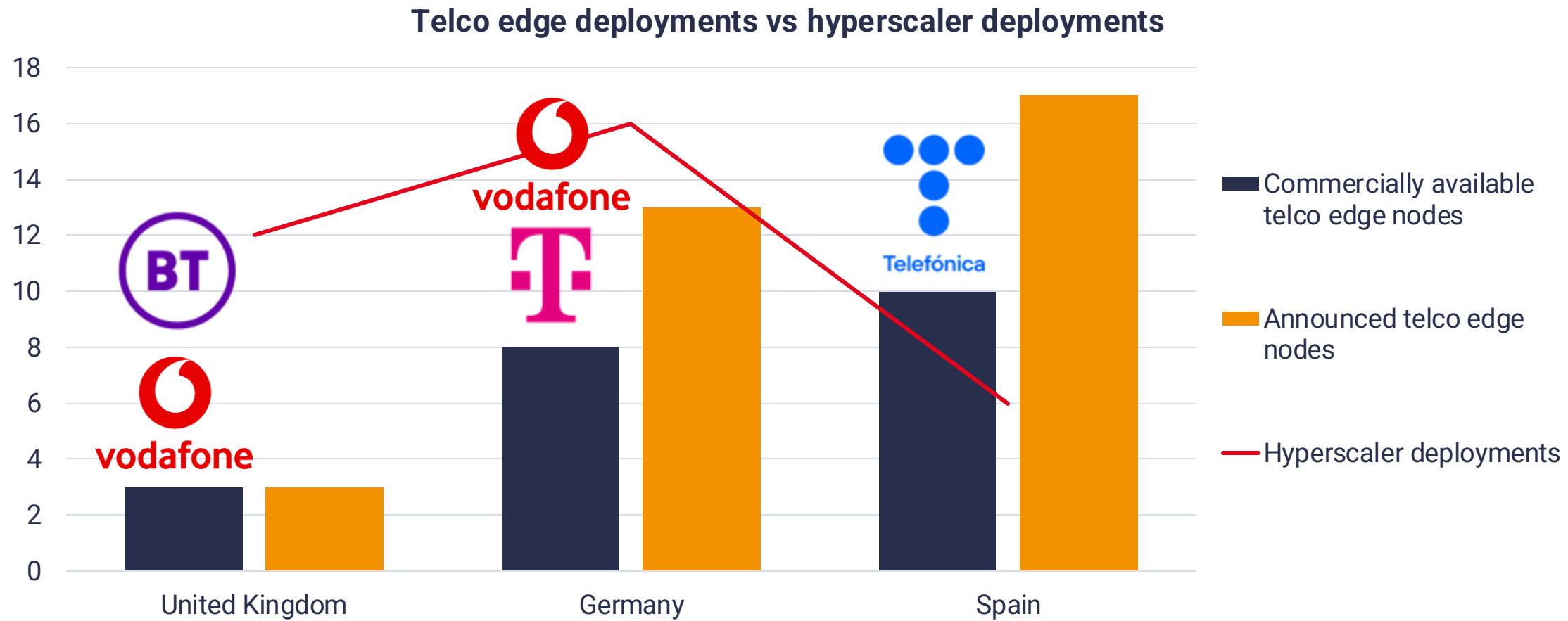
Arvind Krishna, CEO, IBM



By moving AI workloads to the edge, service providers seek to reduce network latency

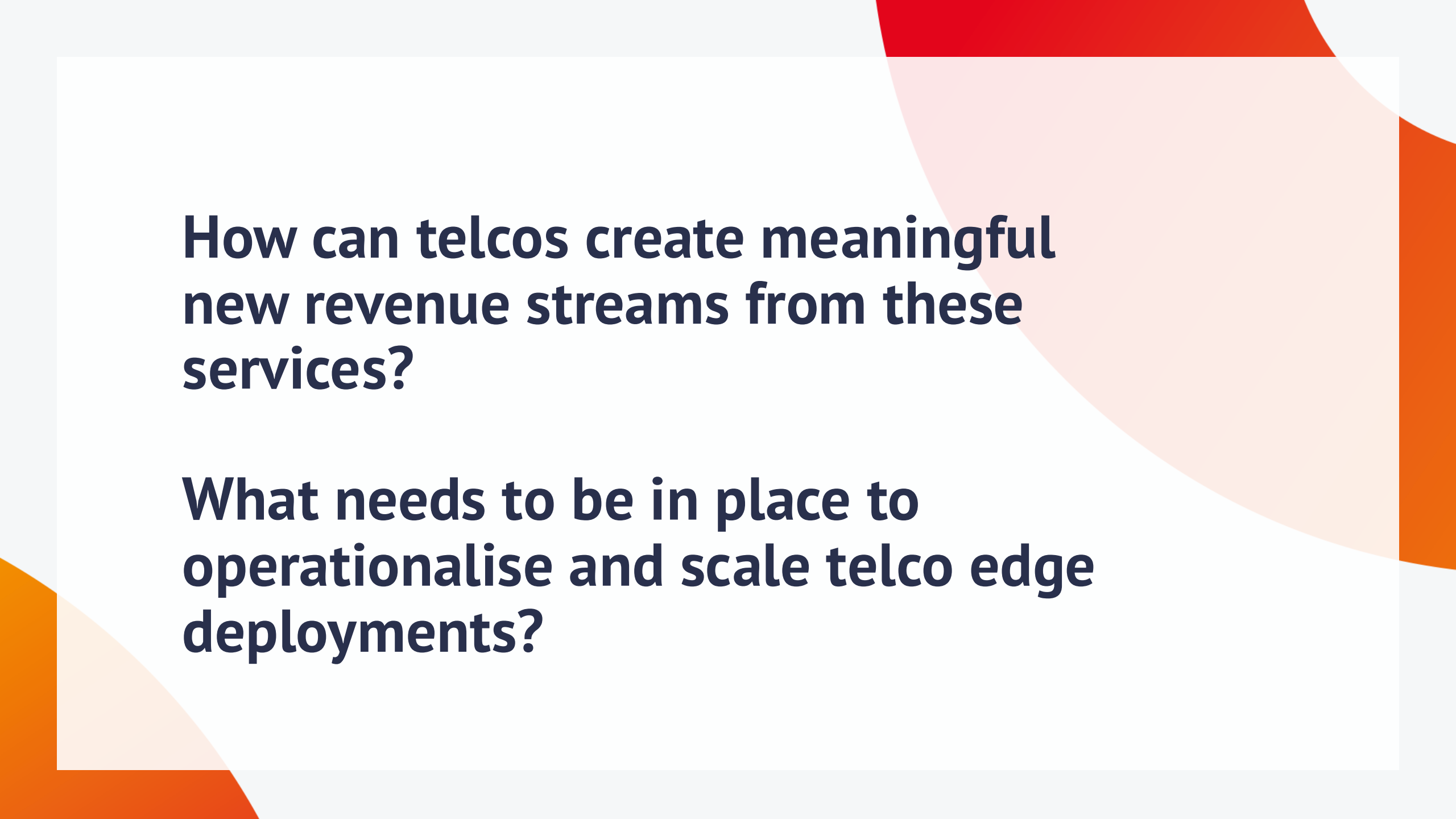


Depth of market penetration, local enterprise support and sovereignty can set telco edge propositions apart



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How can telcos create meaningful new revenue streams from these services?

What needs to be in place to operationalise and scale telco edge deployments?



NEARBY
COMPUTING

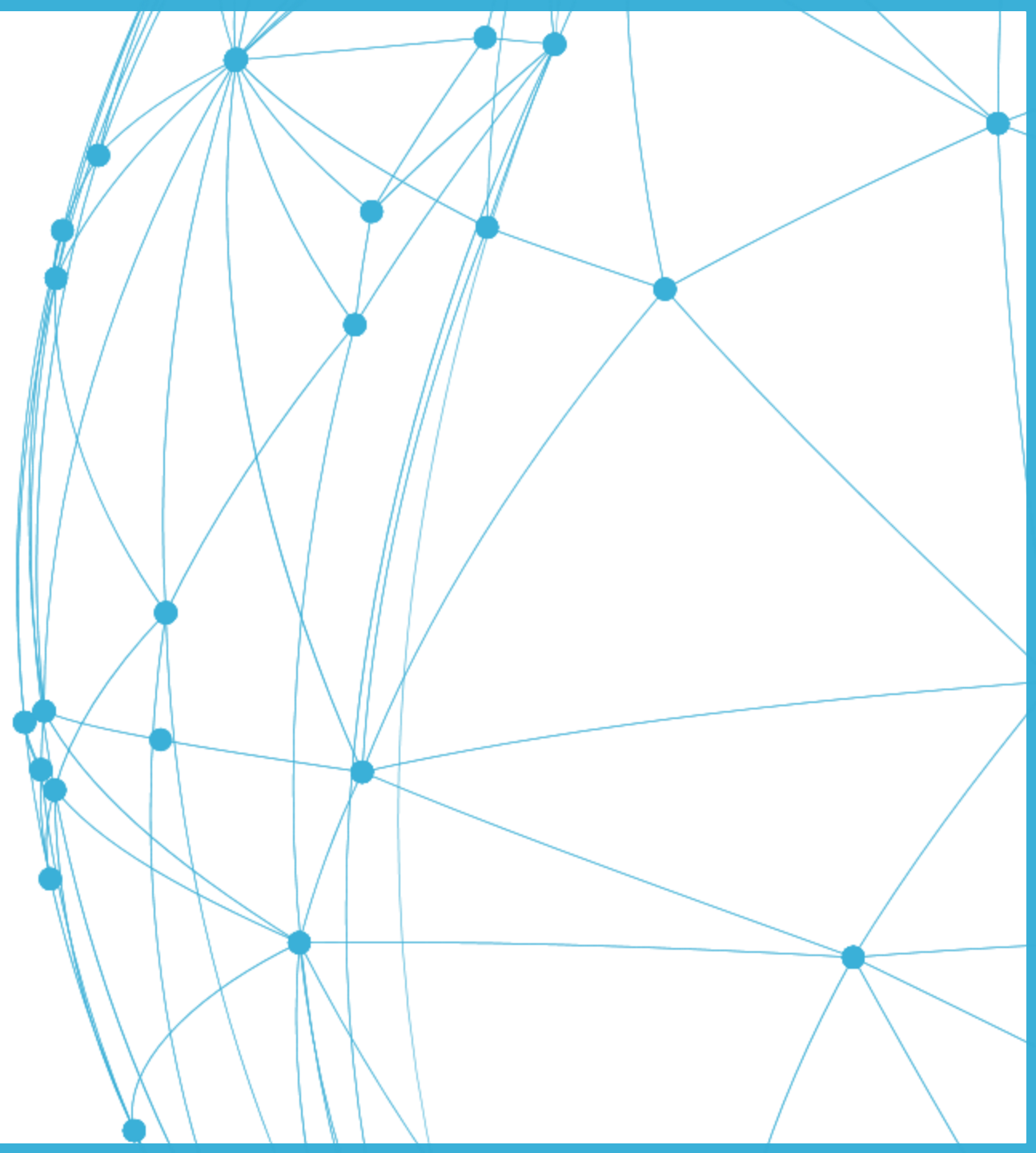
HOW TO BUILD A REAL TELCO EDGE CLOUD

What every operator needs to know

February 2026

CONTENT

- What's changing in the market
- Where growth comes from
- Operating at scale while controlling
- Why the edge is a telco advantage
- Key takeaways



ORCHESTRATION IS MUCH MORE THAN A TECHNOLOGY CHOICE

It is the foundation of a sustainable cloud and edge strategy



GROW REVENUE BEYOND CONNECTIVITY

New revenue models are emerging across cloud, edge and APIs



SCALE WITHOUT INCREASING OPEX

Operational efficiency is becoming a strategic differentiator



EDGE IS A TELCO ADVANTAGE

Proximity, **sovereignty** and **control** create a unique position

Telcos must move faster — or someone else captures the value

REVENUE GROWTH COMES FROM FLEXIBILITY, NOT FROM REPLACING THE LEGACY

Monetisation starts when time-to-market moves from months/years to weeks



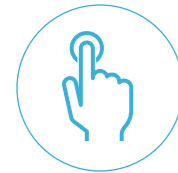
KEEP LEGACY

Protect and evolve legacy: IaaS, VMs and containers must coexist in multicloud



FUTURE SERVICES

Enable **undefined future services** — the platform must adapt before demand pops up



EASY TO CONSUME

Offer **controlled self-service activation** with purchase via catalogues and **marketplaces**



APIs MONETIZATION

Monetise network intelligence & APIs (e.g. CAMARA) as value-added services

SCALE SERVICES WITHOUT SCALING OPERATIONS

– ORCHESTRATION MAKES IT POSSIBLE

Operating at scale while controlling OPEX



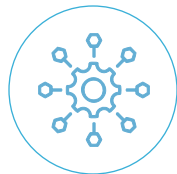
END-TO-END AUTOMATION ACROSS DOMAINS

- Seamless operation of cloud, edge and network services
- Elimination of manual tasks across the full service lifecycle



ZERO-TOUCH PROVISIONING BY DESIGN

- Automated service and network activation, scaling and changes
- Faster delivery without increasing operational effort



ORCHESTRATED OBSERVABILITY WITH A SINGLE OPERATIONAL VIEW

- One pane of glass across multicloud and multivendor environments
- Proactive operations and control driven by real-time insights



INTENT- AND POLICY-DRIVEN OPERATIONS

- Consistent behaviour at scale adding diversity without adding complexity
- Built-in intelligence to continuously optimise OPEX

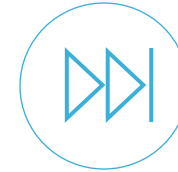
TELCOS ALREADY OWN THE EDGE – THE OPPORTUNITY IS TO FULLY LEVERAGE IT

Those who activate will lead the market



PROXIMITY TO CUSTOMER IS BUILT-IN ADVANTAGE

- Dense, capillary infrastructure close to enterprise operations
- Deep understanding of how edge environments actually run



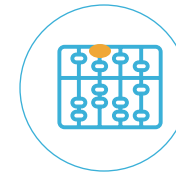
EDGE VALUE GOES BEYOND LATENCY

- Compute-intensive applications run closer to the source of data
- Less backhaul, lower bandwidth costs, better economics



SOVEREIGNTY AND SECURITY DRIVE EDGE ADOPTION

- Data sovereignty enforced at regional and in-country level
- Security and data protection by design – enforced locally



NETWORK CONTROL ENABLES DIFFERENTIATED SERVICES

- Guaranteed bandwidth and SLAs as part of the service
- Fibre penetration and access networks as the real “roads” to the edge

THE EDGE WILL GROW WITH OR WITHOUT YOU – ORCHESTRATION IS KEY TO CAPTURE THE VALUE



DOING NOTHING IS NOT AN OPTION





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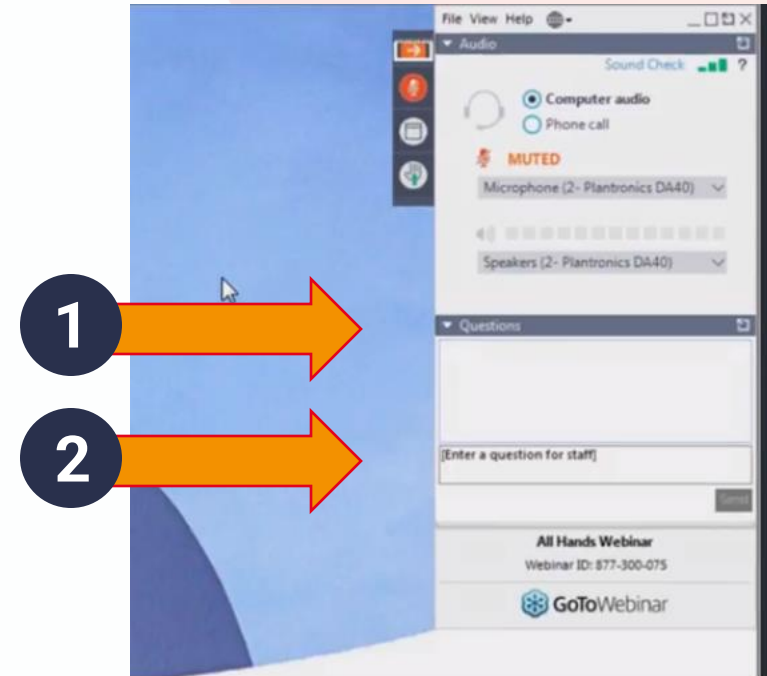
TIMO JOKIAHO

Telco Field CTO

SUSE

For our Q&A...

Please submit any questions using
the GoToWebinar control panel



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Thank you for joining!

All registrants will be receiving the link to the recording and slides shortly to watch back or to share with colleagues, plus a Q&A write-up

For any other questions, please contact:

- Tilly Gilbert, tilly.gilbert@stlpartners.com

