

Asia Pacific 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 Asia Pacific Telecom Cloud Market is poised for significant growth, with projections indicating it will reach approximately US\$ 26,861.3 million by 2031, up from US\$ 6,243.8 million in 2024. This growth trajectory reflects a robust compound annual growth rate (CAGR) of 23.3% from 2025 to 2031.

Executive Summary and Market Analysis

The telecom cloud market in the Asia Pacific region encompasses key countries including China, Japan, South Korea, India, Australia, and others. These nations are heavily investing in advanced network capabilities and cloud platforms to enhance service delivery and scalability. The rapid increase in mobile internet users and data consumption has driven telecom companies to adopt cloud-based solutions, which offer improved operational efficiency, reduced latency, and enhanced customer experiences.

Supportive government policies and public-private partnerships across the region are further bolstering the cloud ecosystem. The presence of major global hyperscalers such as Amazon Web Services (AWS), Microsoft Azure, and Google Cloud has intensified

competition and spurred innovation within the market. For instance, in 2024, public cloud spending in Australia surged to around US\$15,611 million (AUD 23.3 billion), marking a nearly 20% increase, primarily driven by demands for infrastructure and platform-as-a-service solutions.

In 2024, significant investments and strategic partnerships emerged in the telecom cloud sector. Notably, Bharti Airtel partnered with Google Cloud to launch a sovereign cloud service in India, ensuring compliance with local data regulations. Additionally, Tata Communications introduced 'Vayu,' a next-generation cloud fabric that integrates Infrastructure-as-a-Service (IaaS), Platform-as-a-Service (PaaS), artificial intelligence (AI), and security, aimed at simplifying enterprise IT and supporting multi-cloud environments. The Indian cloud infrastructure market also benefited from government initiatives like 'Digital India' and 'Make in India,' which encouraged cloud adoption among small and medium enterprises (SMEs) to enhance digital infrastructure and foster technological innovation.

Strategic Insights

The Asia Pacific Telecom Cloud Market is segmented by various factors, including components, deployment models, service models, and end users. By component, the market is divided into solutions and services, with solutions holding the largest market share in 2024. In terms of deployment, public cloud services dominated the market, while Software-as-a-Service (SaaS) was the leading service model. Large enterprises represented the majority of end users in 2024.

Partnerships with leading cloud service providers (CSPs) and technology vendors present significant opportunities for growth and innovation within the telecom cloud market. As telecom operators face increasing pressure to modernize their infrastructure and scale services, collaboration with hyperscalers like AWS, Microsoft Azure, and Google Cloud allows them to leverage vast computing power, global reach, and deep technical expertise. These partnerships enable telecom providers to transform legacy systems, accelerate the time-to-market for cloud-native offerings, and support emerging use cases such as 5G, IoT, edge computing, and AI-driven network operations. By integrating telecom networks with hyperscaler platforms, operators can also explore new monetization models, including infrastructure-as-a-service, network slicing, and enterprise cloud solutions.

In February 2025, Ericsson and AWS expanded their collaboration by integrating Ericsson's OSS/BSS platforms with AWS infrastructure, allowing communication service

providers to streamline operations and modernize their business models. As cloud capabilities become central to telecom innovation, these strategic partnerships offer telecom providers a powerful path to accelerate digital transformation, enabling scalable, agile, and future-ready service delivery.

Country Insights

The Asia Pacific Telecom Cloud Market is further segmented by country, with China holding the largest market share in 2024. China Telecom has emerged as a significant player in cloud computing and AI-powered telecommunications. In 2024, it enhanced its AI cloud offerings, launching eSurfing Cloud, a public hybrid cloud with extensive global reach and capabilities, which was recognized by Gartner as a leading digital technology trend. Additionally, its TeleAI research arm introduced 'Xingchen,' a multimodal large language platform that addresses accessibility gaps by supporting dialect speech understanding across multiple Chinese dialects, facilitating AI integration into cloud networks.

Company Profiles

Key players in the Telecom Cloud Market include Amazon Web Services Inc., IBM Corp, Microsoft Corp, Google LLC, Verizon Communications Inc., 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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