

Southeast Asia Cloud Computing Market: Current Analysis and Forecast (2025-2033)

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Abstracts

Cloud computing allows the user to save, operate, and manipulate data on remote servers instead of local computers. It promotes instant cooperation, remote accessibility, and quick implementation of applications. This is through shared resources that help businesses to scale their operations dynamically with minimal costs.

The Southeast Asian Cloud Computing market is expected to exhibit a growth rate of 14.56% during the forecast period (2025-2033F). The Southeast Asia cloud computing market can be attributed to high-speed digitalization, government-funded programs that encourage smart cities and e-governance, and increasing enterprise needs for scalable IT supporting infrastructure. The growth in e-commerce, fintech, and telecommunication usage leads to more cloud deployment, and SMEs are looking at affordable and scalable solutions. Moreover, the increased connectivity, growth in data center infrastructure, and emphasis on business continuity further increase industry adoption.

Malaysia rolled out its National Cloud Computing Policy (NCCP) on August 13, 2025, during the Asean AI Malaysia Summit 2025 (AAIMS25). The policy outlines how Malaysia plans to improve its national cloud infrastructure, strengthen data governance, and speed up cloud adoption in the public and private sectors.

Based on type, the market is segmented into private cloud, hybrid cloud, and public cloud. Among these, the public cloud market held the dominant share of the cloud computing market in 2024. In Southeast Asia, the market is experiencing growth due to the offer of cost-effective scalability and flexibility by public cloud services to enterprises. The public cloud platforms are being embraced by companies to support remote operations, handle data loads, and drive digital transformation. The ease of deployment and its pay-as-you-go

business model are enabling companies, particularly SMEs, to innovate at a faster rate without the need to install extensive infrastructure. For instance, on October 2, 2024, Oracle announced plans to invest more than USD 6.5 billion to meet the rapidly growing demand for its artificial intelligence (AI) and cloud services in Malaysia by opening a public cloud region in the country. The upcoming cloud region will enable Oracle customers and partners in Malaysia to leverage AI infrastructure and services and migrate mission-critical workloads to Oracle Cloud Infrastructure (OCI).

Based on service, the Southeast Asian Cloud Computing market is segmented into SaaS, PaaS, and IaaS. Among these, the SaaS cloud computing market held the dominant share of the Southeast Asia Cloud Computing market in 2024. SaaS represents a significant engine of expansion as companies move away from on-premise systems and adopt cloud-based applications to achieve agility and productivity. The increasing need for CRM, ERP, and collaboration tools in industries is driving SaaS in the region. Its subscription service allows businesses to manage IT expenses, update in real time, and even access it remotely. On March 10, 2025, Tencent Cloud announced its strategic partnership with TrueWatch, a Singapore-based unified monitoring platform provider. The deal was signed during its first Tencent Cloud Day in Indonesia, marking a step forward in enhancing cloud observability solutions in Southeast Asia. Under this partnership, TrueWatch will be able to use the local data centre infrastructure of Tencent Cloud to deploy the first Multi-Cloud SaaS Observability Platform in Indonesia. This platform will enable businesses to have real-time monitoring, analytics, and cloud-native observability solutions in their multiple cloud environments.

Based on industry, the market is segmented into banking & financial services, information & communication technology, government, consumer goods & retail, healthcare, and others. Among these, the healthcare segment is expected to grow at a significant CAGR during the forecast period (2025-2033). The healthcare industry is rising towards the use of clouds to help telemedicine, electronic health records, and data analytics related to patients. Cloud computing assists hospitals and health facilities in simplifying processes, enhancing diagnostics, and securing data management. The use of cloud infrastructure in healthcare innovation is also being promoted by government digital health programs in Southeast Asia.

For a better understanding of the market adoption of the Southeast Asian Cloud

Computing market, it is analyzed based on its regional presence in Southeast Asia, including Indonesia, Thailand, the Philippines, Vietnam, Malaysia, Singapore, and the Rest of Southeast Asia. Indonesia is expected to grow at a significant CAGR during the forecast period (2025-2033). The rapid digitalization, the booming startup ecosystem, and the good support of the government contribute to making Indonesia the fastest-growing cloud market in Southeast Asia. Adding to this, the rising number of internet users and the growing e-commerce industry in the country are compelling companies to move to the cloud to be scalable and improve data efficiency. The adoption is increasing due to recent investments in local data centers and the affiliation of cloud providers and telcos. With the further intensity of digitalization in industries, Indonesia is becoming a key driver of expansion in the regional cloud computing space. On May 27, 2025, Microsoft announced the opening of its first cloud region in Indonesia, called Indonesia Central. This is an AI-ready hyperscale cloud infrastructure that offers in-country data residency, high levels of security, and lower latency. This marks a significant progress towards Microsoft's investment commitment in Indonesia. With a planned investment of \$1.7 billion dollars in the period 2024-2028, the Indonesia Central cloud region will enable businesses from across the world to ideate, develop, and scale digital innovation in Indonesia, positioning the country as a global economic powerhouse.

Some major players running in the market include Amazon Web Services, Inc. (Amazon.com, Inc.), Microsoft, Google LLC, Alibaba Cloud, Huawei Cloud Computing Technologies Co., Ltd., IBM, Tencent Cloud, Oracle, Zenlayer, Inc., and STT GDC Pte Ltd.

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