

# Connectivity as Service: Trip to the Cloud



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**The challenges of COVID-19 pandemic accelerated the adoption of cloud services to keep us connected like never before.**

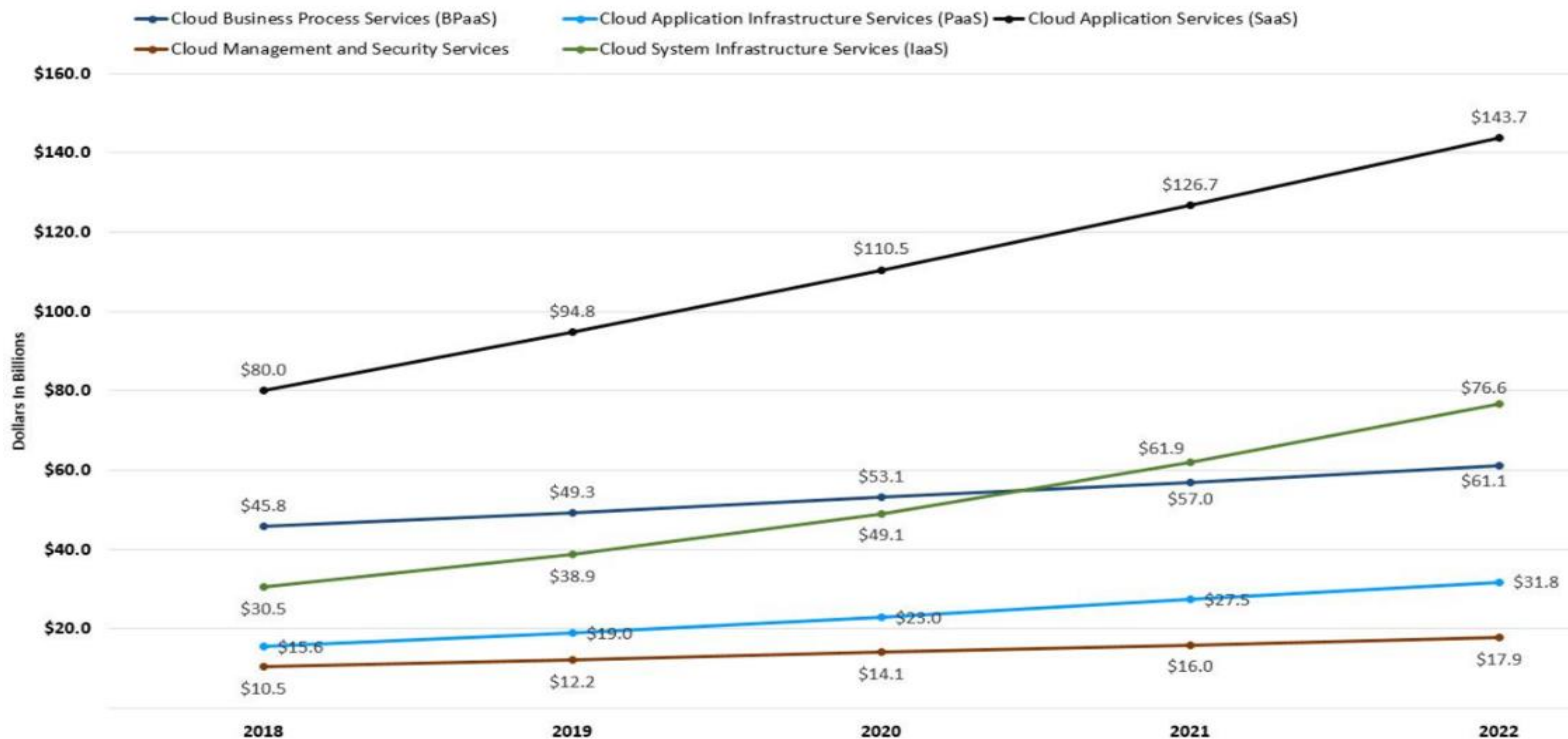
### **Key drivers:**

- **Flexibility and scalability**
- **Security**
- **Cost effectiveness**
- **On-demand services**

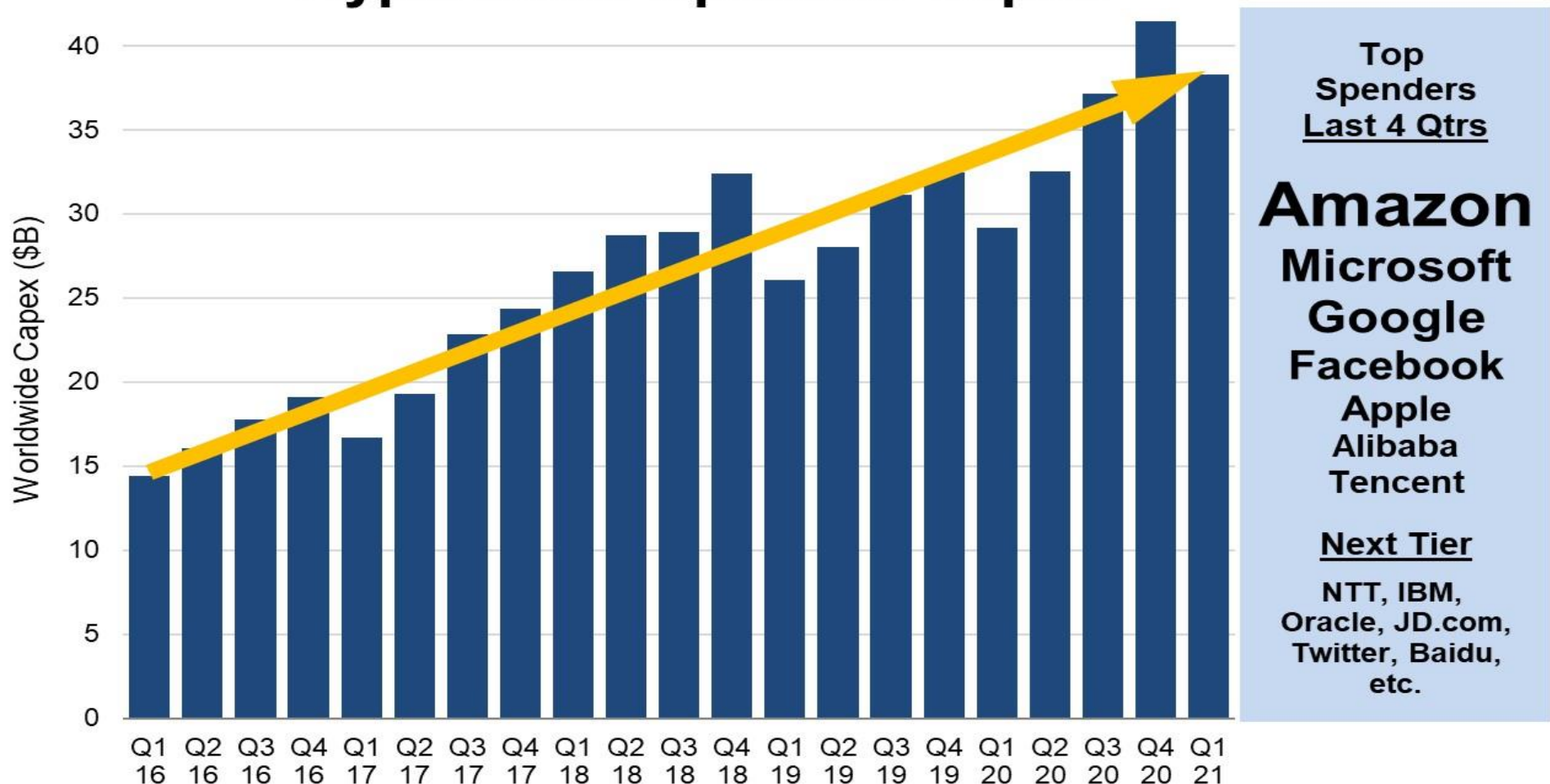
# The Cloud Advantage

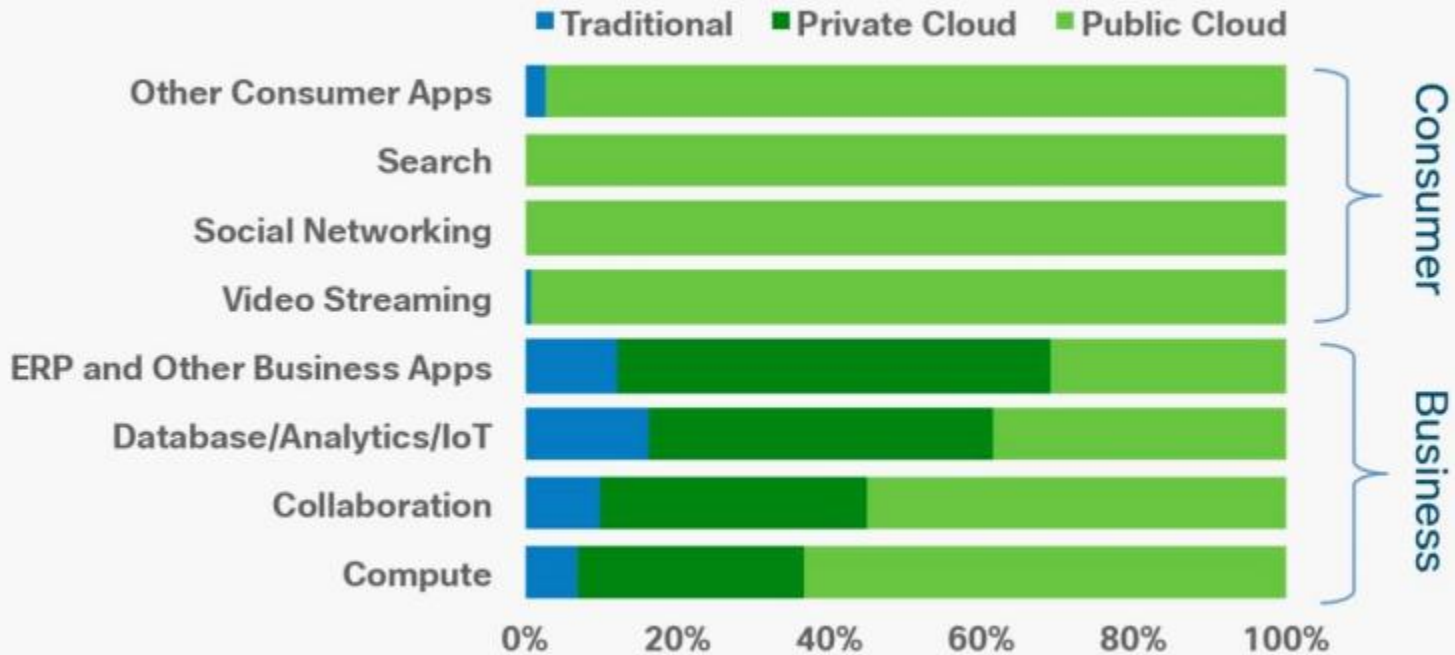
- **Direct and private connections to the cloud**
- **Secure public internet use**
- **High network performance**
- **Cost efficiency**

# Worldwide public cloud service revenue forecast 2018-2022 (\$bn)



# Hyperscale Operator Capex






Source: Cisco Global Cloud Index, 2016-2021.

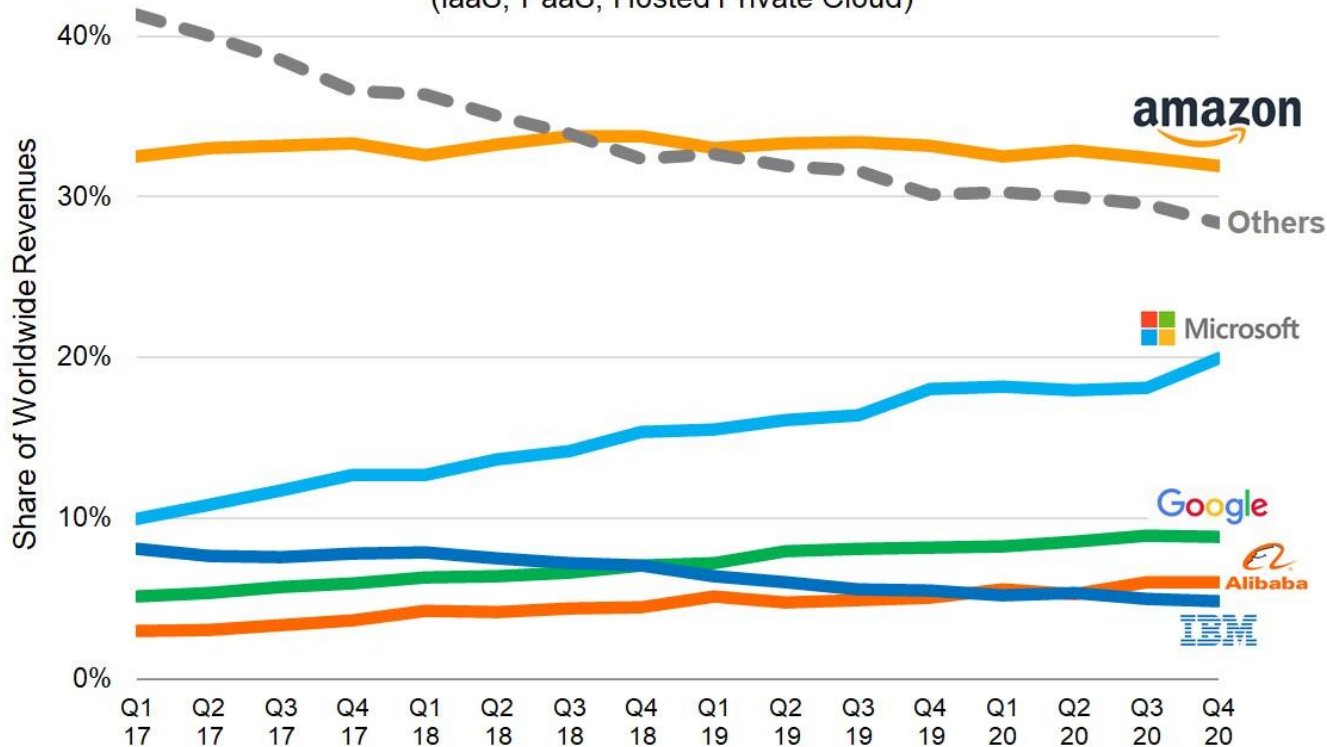
**Global data center workloads and compute instances by applications: Traditional vs. cloud (2021)**

# **Top Cloud Service Providers**

A dark blue diagonal graphic that starts from the bottom left corner and extends towards the top right corner, creating a triangular shape on the right side of the page.

# Cloud Provider Market Share Trend

(IaaS, PaaS, Hosted Private Cloud)



Source: Synergy Research Group

Amazon's market share has stayed between **32-34%** on a four-year period. Microsoft hit the milestone of achieving a **20%** worldwide cloud computing market share.

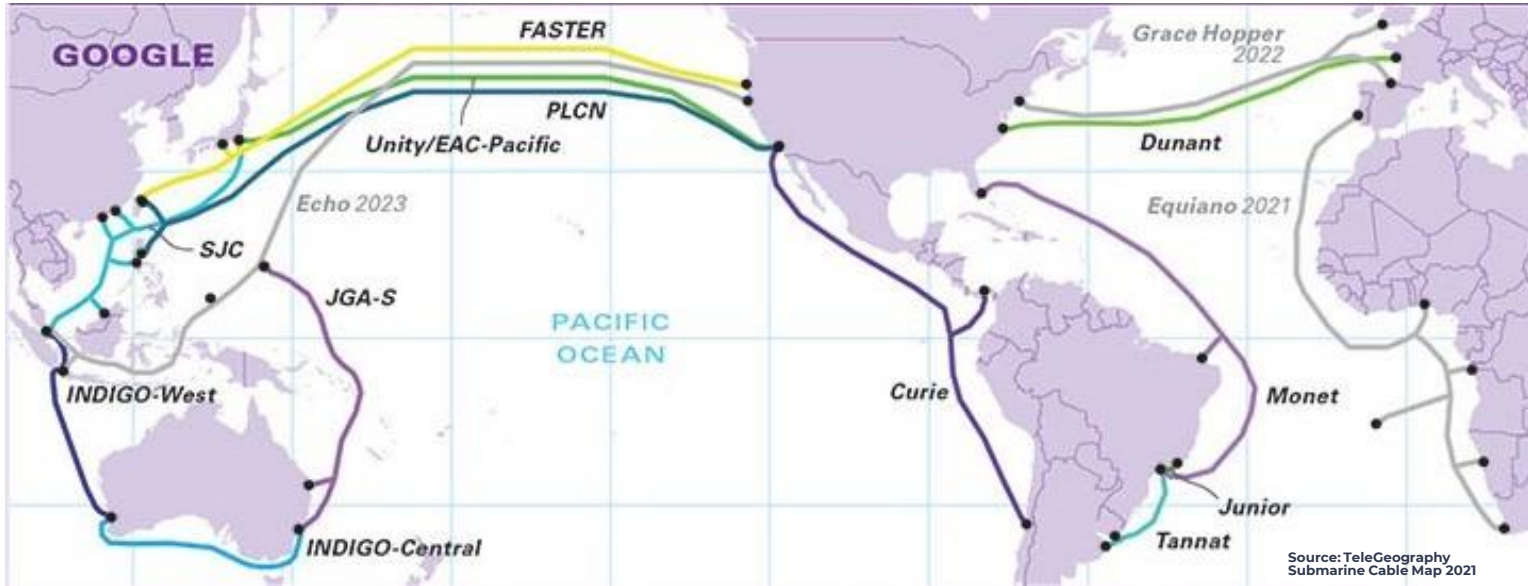


## Cloud Service Providers' revenue growth by the numbers (Q1 2021)

- AWS revenues grew **32%**, generating **\$13.5 billion**.
- Microsoft Intelligent Cloud segment grew **23%** to **\$15.1 billion**.
- Google Cloud brought in **\$4 billion** in sales, up **46%** from the prior year.
- Alibaba's cloud computing revenue increased by **37%**

# Independent Connectivity

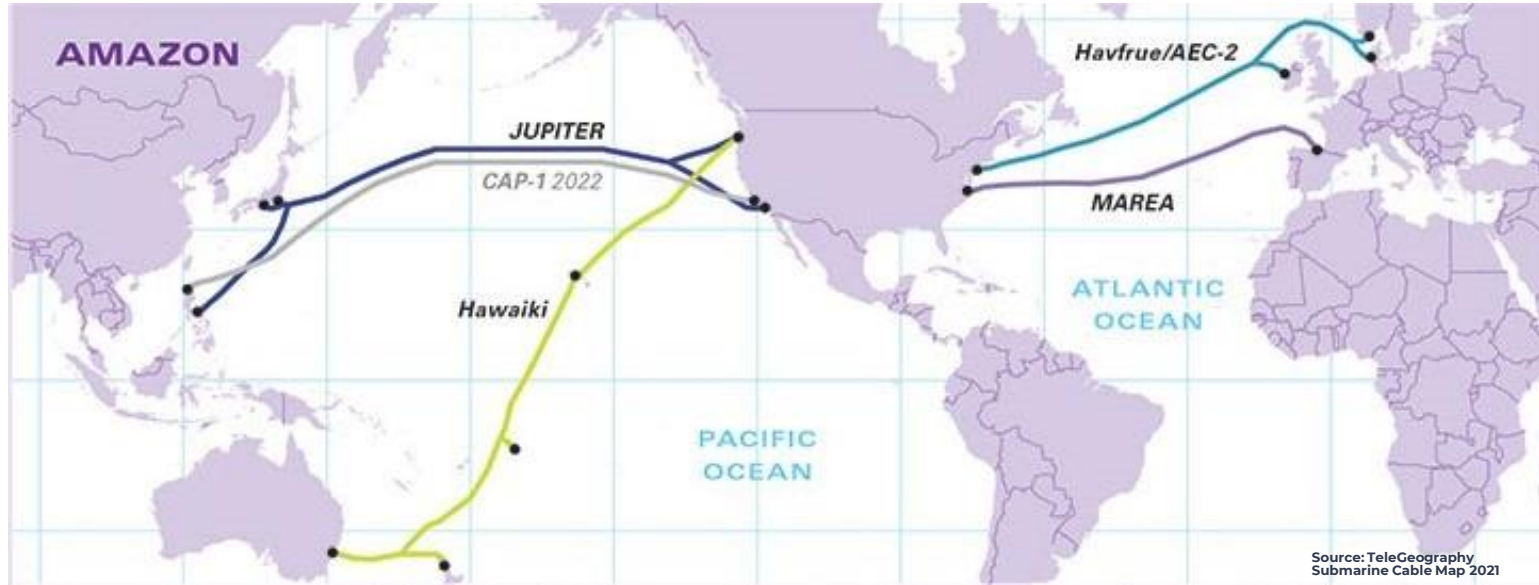
Submarine Cable  
Investments of  
Content Providers



Google now has an ownership stake in at least 15 undersea cables around the world.

**Current:** FASTER, PLCN, Unity, Dunant, Monet, Junior, Tannat, Curie, JGA-S, SJC, INDIGO-West, INDIGO-Central

**Upcoming:** Equiano (2021), Echo (2023), Grace Hopper (2022)



**Current: Havfrue, Hawaiki, JUPITER, MAREA**

**Upcoming: The CAP-1 system is expected to be ready for service by the fourth calendar quarter of 2022.**



**Current: AEConnect-1, GTT Express, MAREA, New Cross Pacific (NCP) Cable System**

**Upcoming: The Amitié cable project is set to be completed in the first quarter of 2022.**

# Evolution of Hyperscalers with Telcos



**Google, Amazon and Microsoft collaborate with network providers for new market trends in the 5G and IoT era.**

**Some strategic cloud ecosystem telco partners:**

**AT&T**

**Etisalat**

**Ooredoo**

**PCCW Global**

**Verizon**

**Vodafone**

**Zain KSA**



**Thank you!**