



Cloud Computing - UK - 2021

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This report looks at the following areas:

- How the already dynamic growth of cloud computing was further accelerated by the COVID-19 pandemic.
- How large the expectations remain for cloud computing, and how it is emerging from its embryonic state.
- How cloud offerings are equating the competitive landscape for SMEs that now have access to technologies such as AI and ML that would previously have proved prohibitively expensive.
- How the various cloud options have different applications and how companies are moving from public, private and hybrid clouds to multi-cloud strategies and how the industry is responding with joint cloud offerings.
- How the American and Chinese technology giants are competing for global positioning.

There are few markets where the market leader can achieve a 29% increase in revenues and still see its market share fall. Yet AWS, one of the pioneers of cloud computing as a commercial proposition, saw its global market share fall from almost 45% in 2019 to 41% in 2020. Despite Amazon's major market share and its meteoric rise in the market, the company did not invent the concept. Amazon was only three years old when the first references were made elsewhere to cloud computing, and Amazon did not commercialise it till 2006.

Digitisation of business, public service and indeed consumer markets was already rapidly developing. COVID-19 and the associated government measures to prevent the pandemic spread created ideal conditions for the furthering of that trend. While some of those conditions will change as restrictions are removed, the trend to cloud computing will only gather pace.

There are few realistic obstacles to the furthering of cloud computing as a market, with the major challenge revolving around how to gain share in a



"The cloud computing model is inherently designed to handle fluctuating demand and was therefore ideally placed to handle the impacts of the COVID-19 crisis."
– Terry Leggett, Senior Analyst

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market with huge further potential. A further challenge lies in providing such services in an environmentally sound way.

Opportunities abound; IBM estimates only 25% of workloads have yet been placed on the public cloud and that the hybrid cloud potential is US\$1 trillion. Beyond the market size, the technology will transform incorporating growing levels of artificial intelligence and machine learning as the relentless growth in data generation poses new challenges.



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