

# 公有云的前世今生

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# 公有云重要里程碑

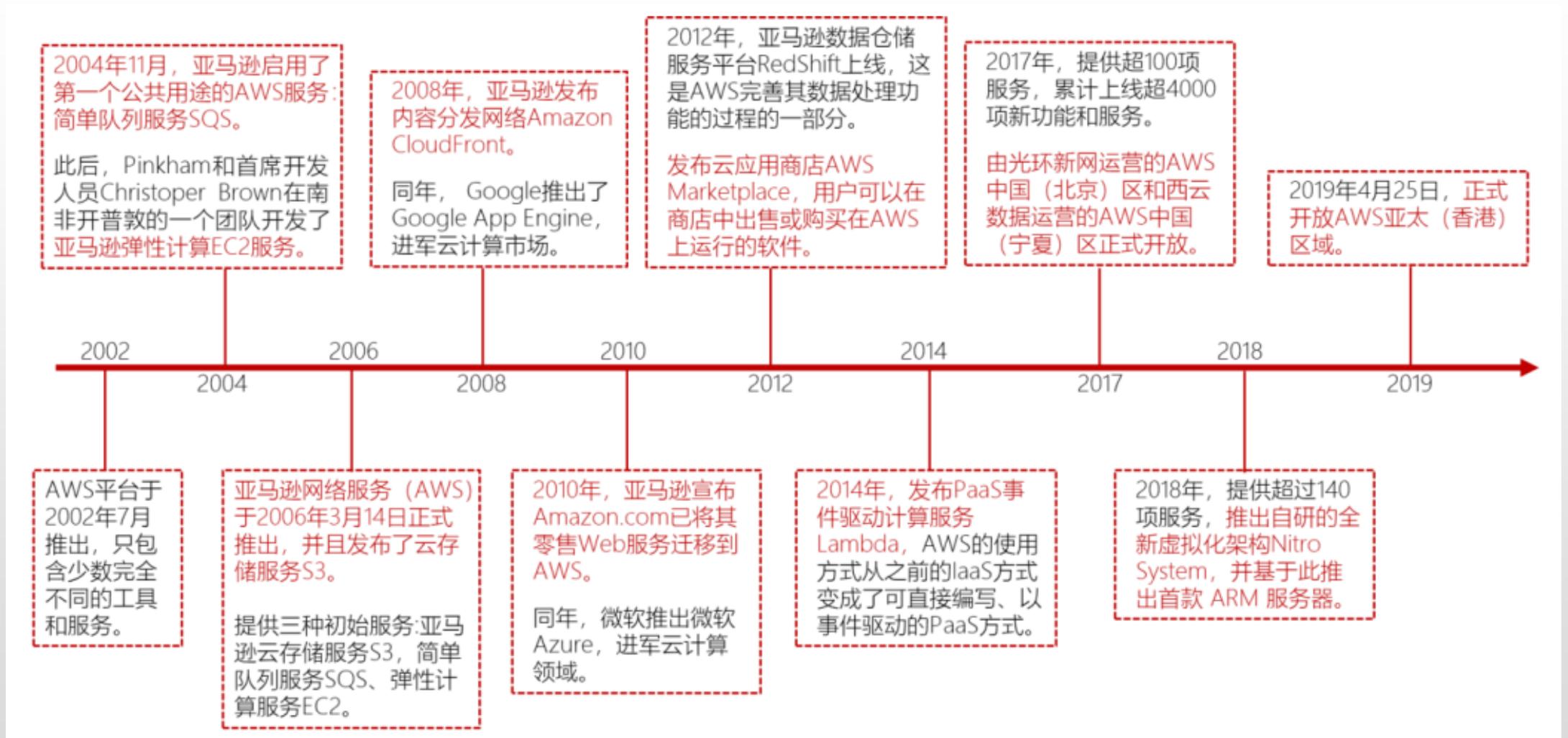


前期积累阶段 1999 云服务初现阶段 2006 云服务形成阶段 2009 云服务快速发展阶段 2015 云服务迈向成熟

# 魔力象限变化图

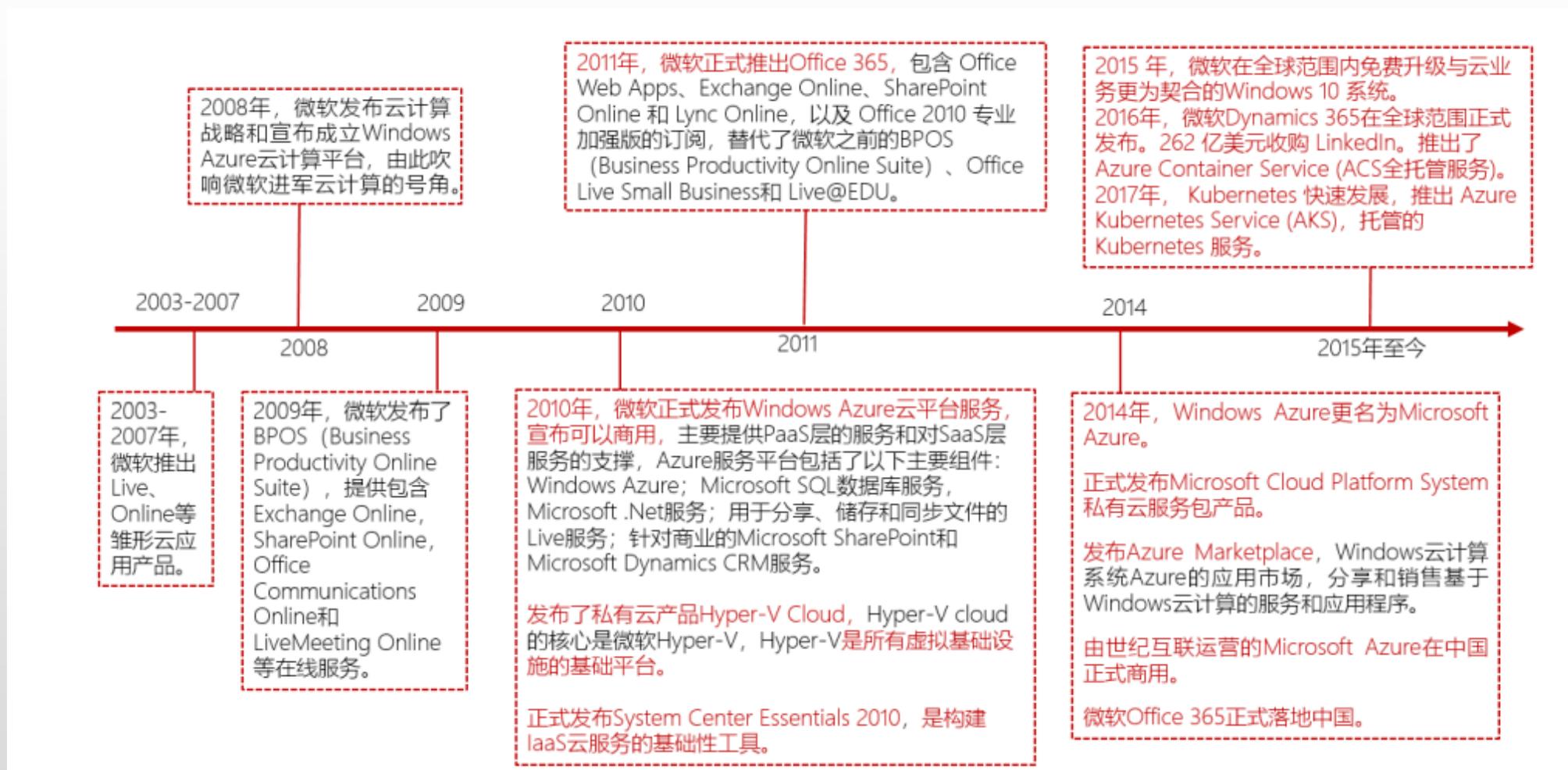
分类	公司	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
互联网公司	AWS	visionaries	visionaries	leader							
	Google						visionaries	visionaries	visionaries	visionaries	leader
	Alibaba Cloud									visionaries	niche players
软件提供商	Microsoft					visionaries	leader	leader	leader	leader	leader
	Oracle									visionaries	niche players
	Vmware						niche players	visionaries	niche players		
硬件提供商	IBM	leader	visionarie	challenger		niche players	visionarie	visionarie	niche players	visionarie	niche players
	Dell				niche players						
	HP					niche players	niche players				
运营商相关	Verizon Terremark					challenger	visionaries				
	AT&T	leader	leader	leader	leader						
	Savvis	leader	leader	leader	leader	challenger					
	Terremark	leader	leader	leader	leader						
	Verizon Business							niche players			
	NTT Communication		niche players					niche players	niche players	niche players	niche players
	Interoute							niche players		niche players	
IT服务	Tata communications			niche players							
	Tier3			niche players	visionaries	niche players					
	Fujitsu				niche players						
	Joyent	visionaries	visionaries	visionaries	challenger	niche players	niche players	niche players		niche players	
	CSC	challenger	visionaries	leader	leader	leader	visionaries	niche players			
	SunGard	challenger	challenger								
	QTS	niche players									
IDC	NaviSite	challenger	challenger	challenger							
	OpSource	niche players	challenger	challenger							
	Datapipe		challenger	niche players							
	GoGrid	visionarie	visionarie	challenger	challenger	niche players	niche players				
	Bluelock			leader	challenger						
	Dimension Data				leader	challenger	niche players	niche players			
	Rackspace	leader		visionaries	visionaries	visionaries	niche players				
	Dimension Data				leader		niche players	niche players			
	softlayer	niche players									
	Media Temple	niche players	niche players								
小公司	layered technologies	niche players	niche players								
	OpSource										
	Hosting.com		niche players	niche players							
	Carpathia Hosting		niche players	niche players							
	Iland			niche players							
	OVH				niche players						
	Virtustream				visionarie	niche players					
	CenturyLink							niche players	niche players	niche players	
	Skytap	niche players								niche players	

# (互联网)AWS:具备先发优势和技术能力, 占据全球云市场半壁江山



亚马逊最早布局 IAAS 云服务, 拥有先发优势, 同时采取低价、以客户为中心等竞争策略不断积累客户, 还通过不断进行技术研发与创新, 构筑起 IAAS 层和 PAAS 层高竞争壁垒, 不断增强客户粘性, 目前 AWS 在全球积累了超百万活跃客户和优质合作伙伴, 打造了强大的云生态系统。

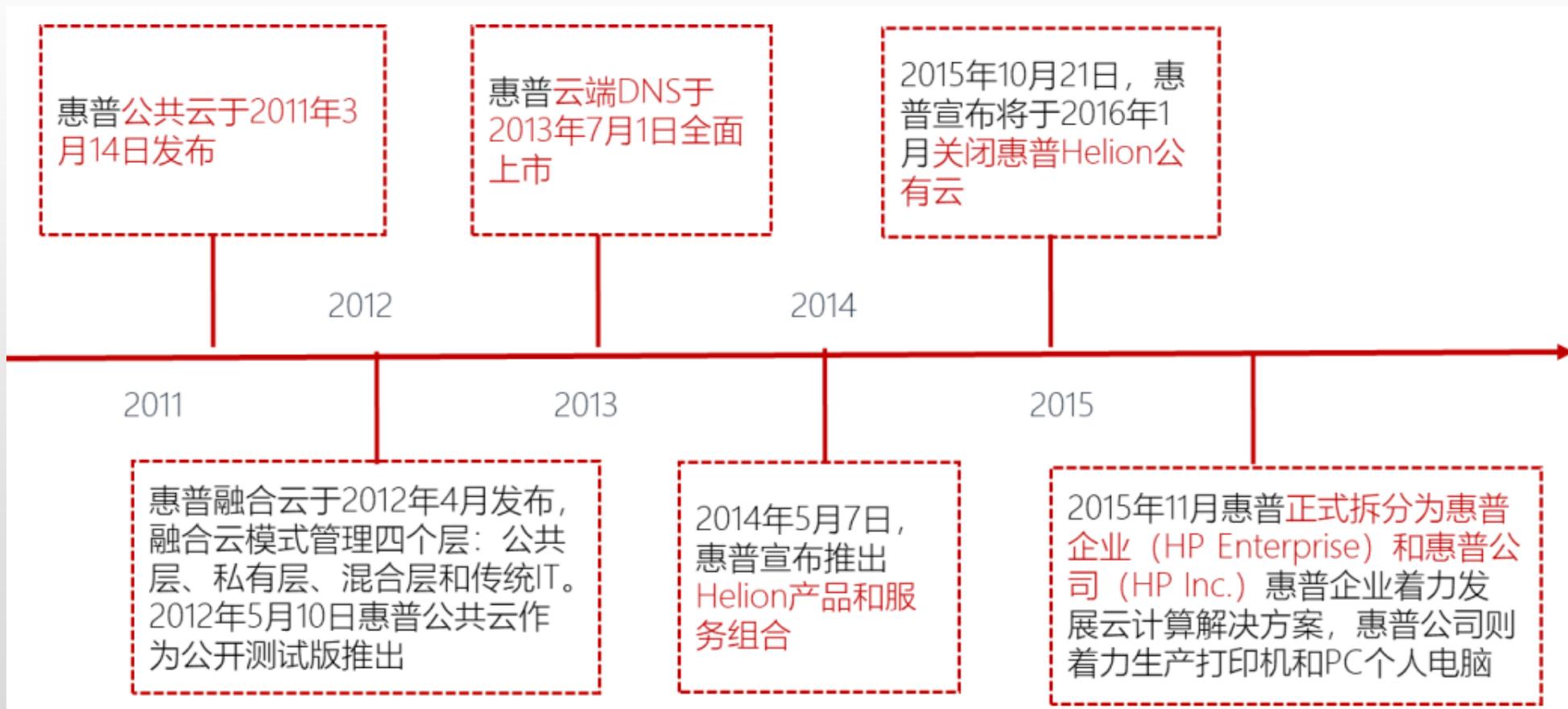
# (软件提供商)Azure:大力布局 SAAS 和 PAAS 服务 为 IAAS 导流



微软2010年正式发布Windows Azure PAAS云平台 and 构建IAAS云服务的基础性工具, 从2014年开始明确向云计算全线转型, 微软股价走势出现拐点, 呈现不断上升趋势, 2017年, 微软再次调整重点, 将"云第一"作为下一步重点战略, 重点布局云计算和AI。

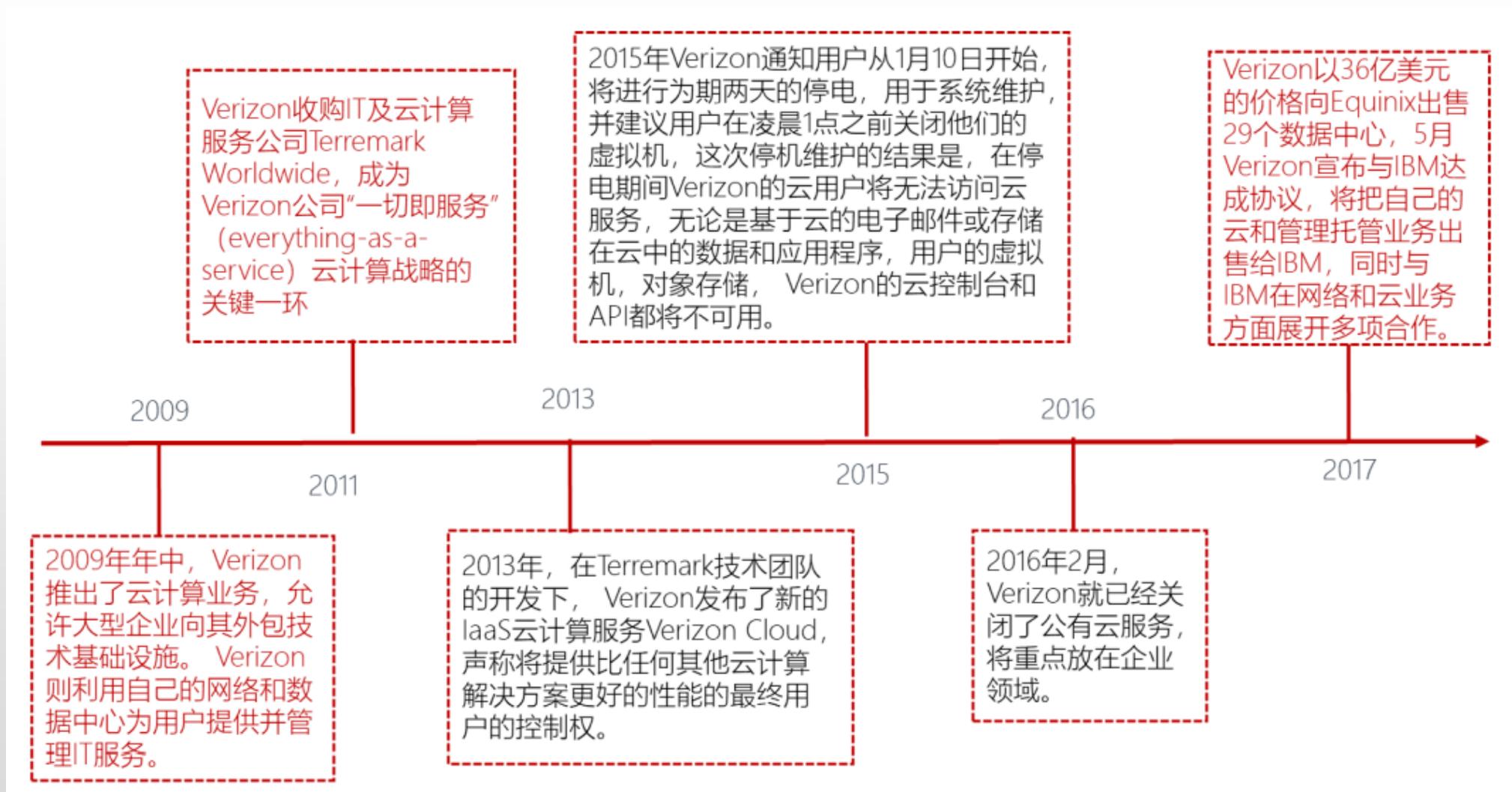
# (设备商)惠普：浅尝辄止云计算，知难而退坚守优势行业

惠普于 2011 年发布公有云服务，于 2015 年正式关闭惠普 Helion 公有云服务



云业务与传统业务“左右手互搏”，进军云市场阻力重重

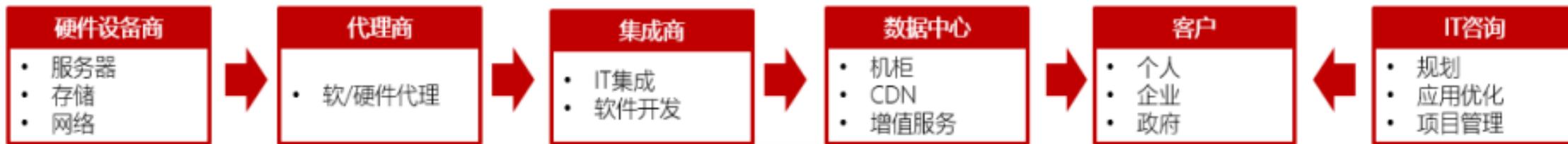
# (运营商)Verizon: 试水云计算, 曲折前行, 高开低走



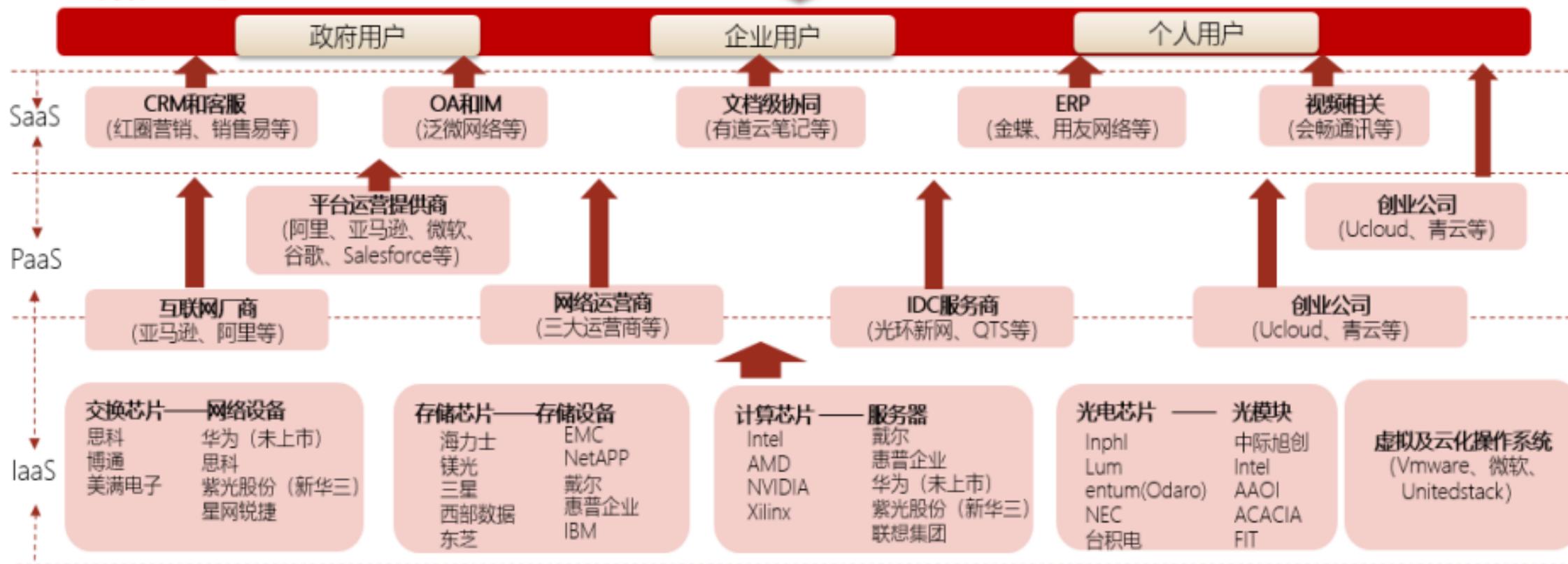
Verizon 退出 IAAS, 主要是由于不具备技术创新能力, 保留 PAAS 和 SAAS 主要是由于这两种服务模式具备更明显的路径依赖和更多的市场机会。

# 产业链变化

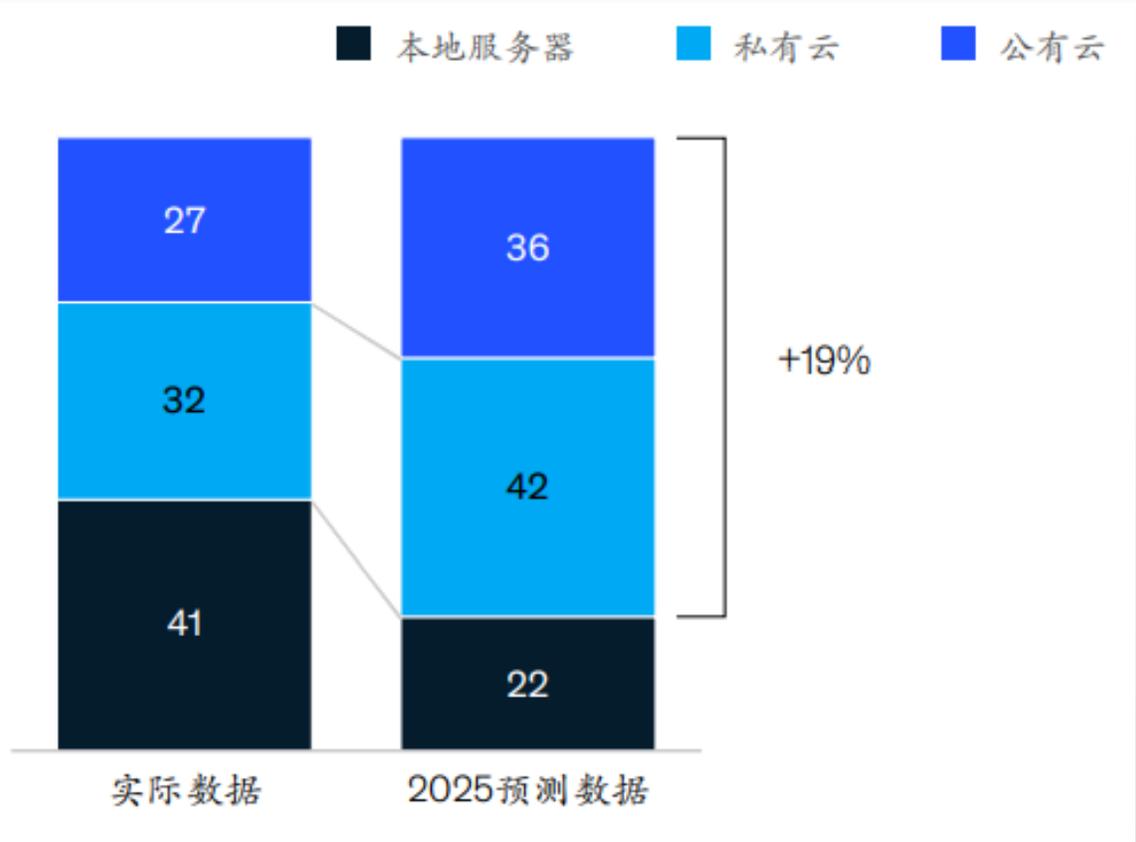
## ■ 传统IT产业链



## ■ 云计算产业链



# 未来消费者驱动的增长仍将成为云计算普及的重要动力，下一波云迁移浪潮由工业和制造业等关键领域来引领



中国市场上私有云仍保持对公有云的优势

企业用云量将全面上涨，但不同行业之间存在差异。

各行业的IT工作负载分配<sup>1</sup>  
每个行业所有受访者的平均百分比

到2025年的IT工作负载变化<sup>2</sup>  
平均变化，百分比



经济地位最重要的两个行业在云迁移上处于落后状态

感谢

谢谢！



<https://pincloud.fr>

