



OVH

Innovation is Freedom

The future of the Cloud

by OVH, the European Cloud IaaS Leader

Cloud Fest – March 14, 2018

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Cloud

A WorldWide booming market

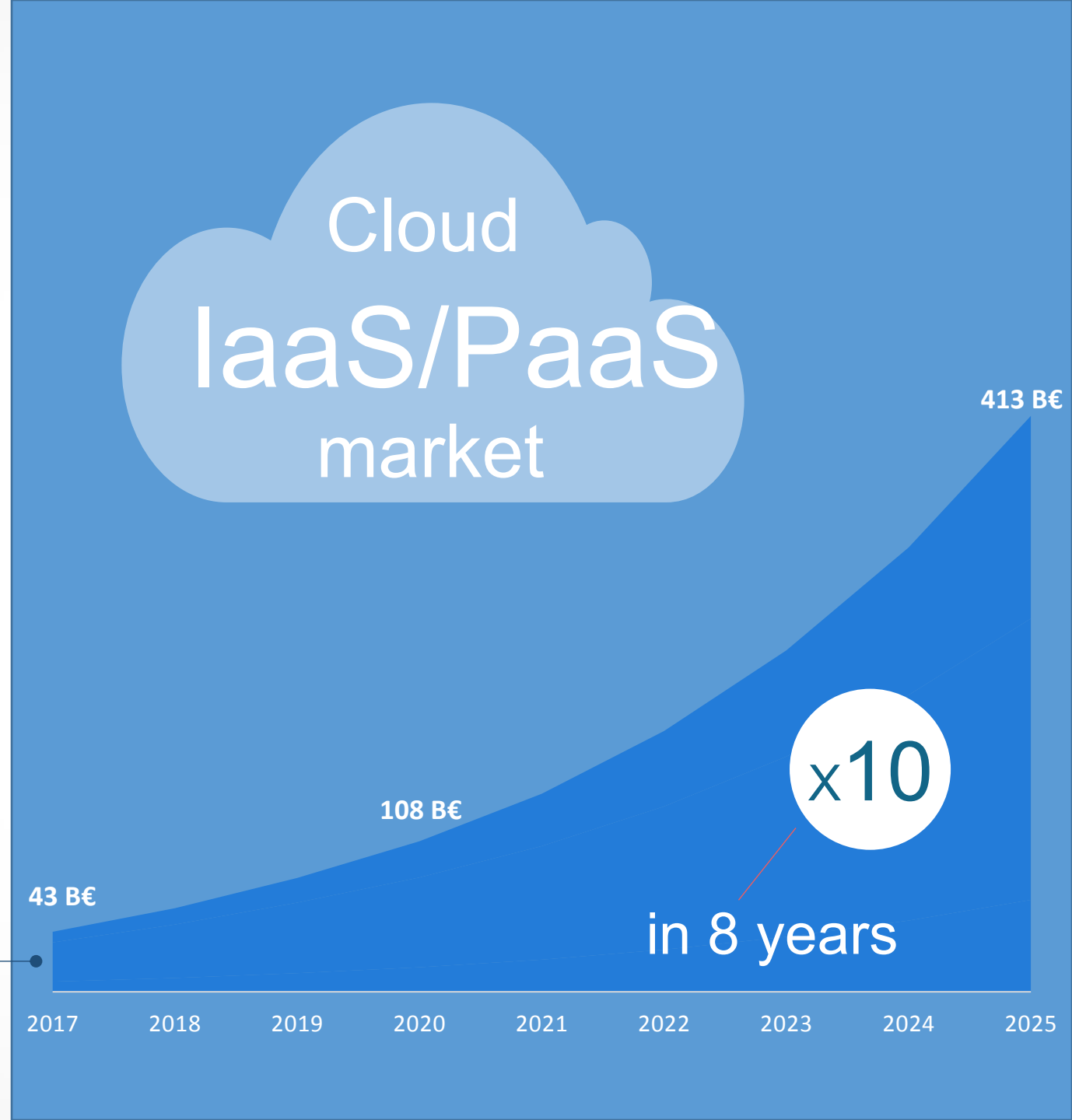
DIGITAL REVOLUTION

- IT Legacy migration
 - Data explosion:
+ 40%/year
 - New Digital Services



IaaS/PaaS EXPONENTIAL GROWTH

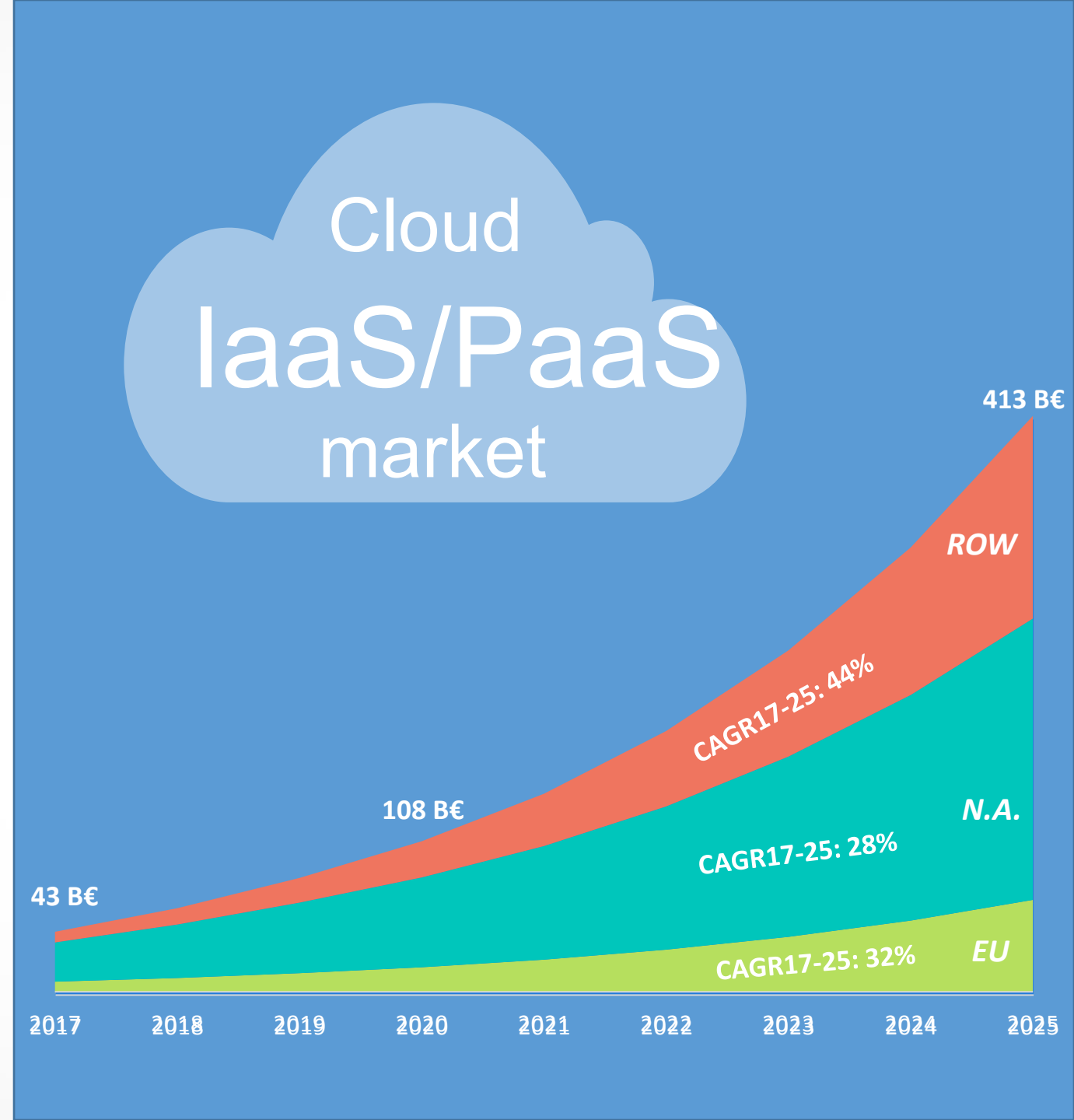
It's just the beginning



GEOGRAPHY MIX

North America remains
the biggest market

The future of growth is
in emerging countries

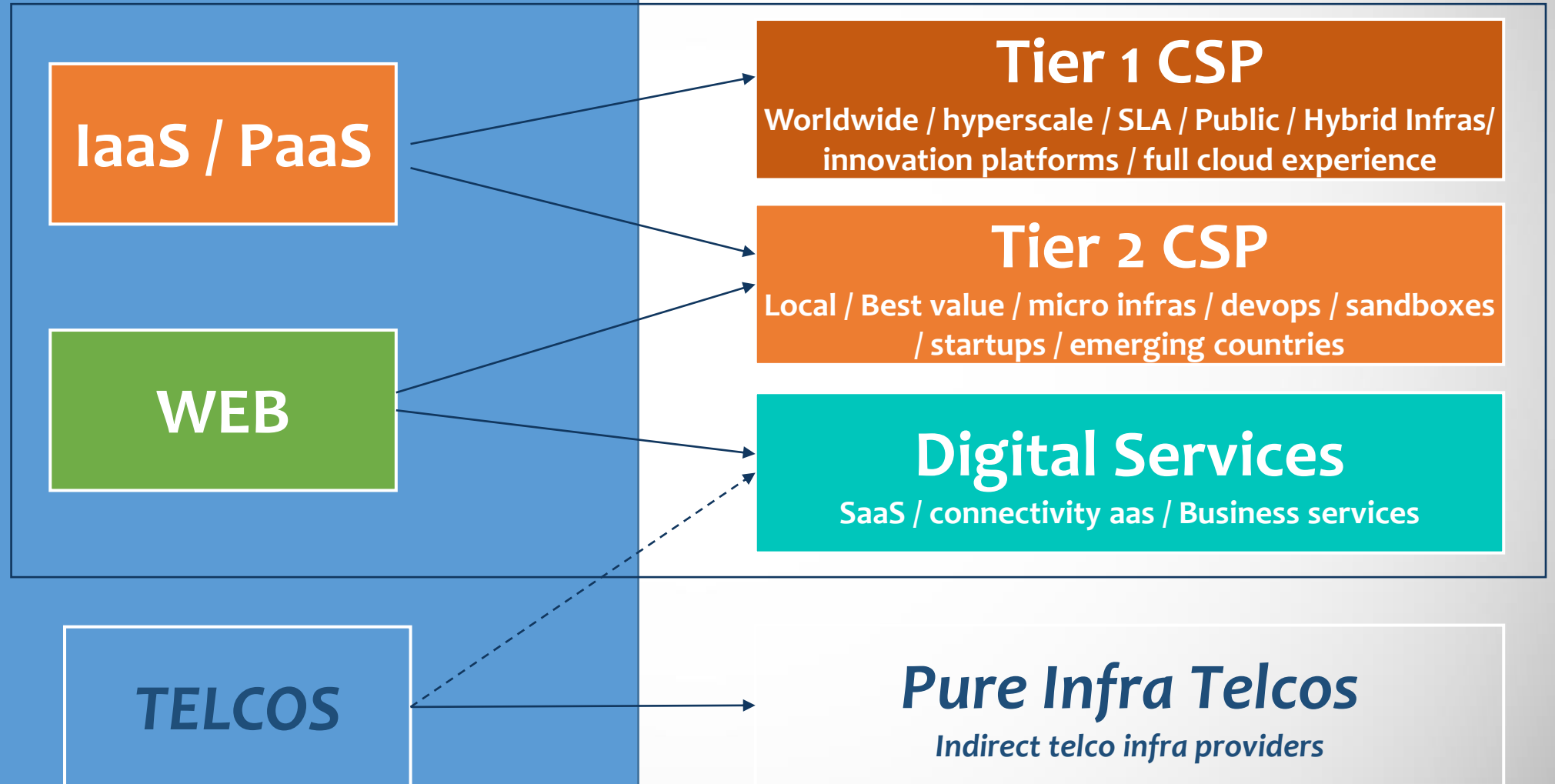


CLIENT SIZE

SMB represents the largest market share
But mid-large customers are coming



MARKET TRANSFORMATION

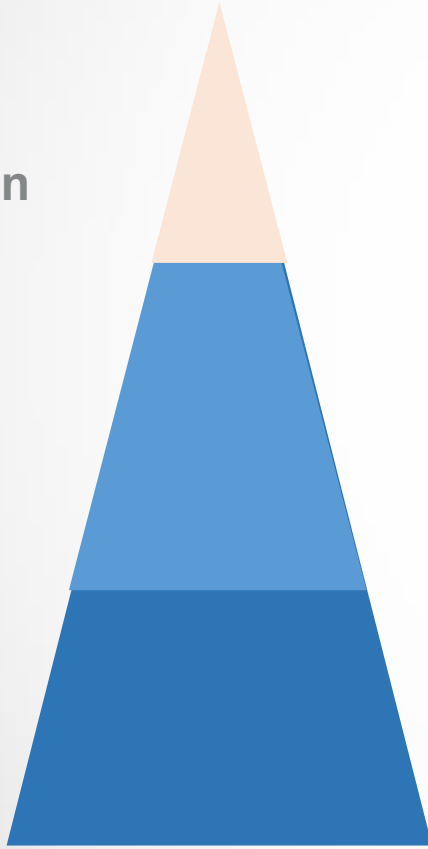


DIVERSITY OF NEEDS

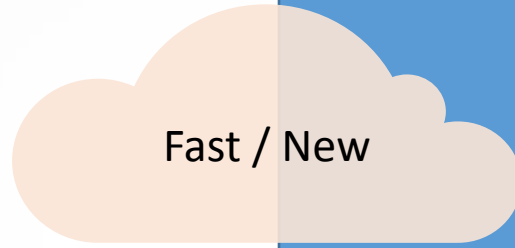
Business Innovation

Core Business

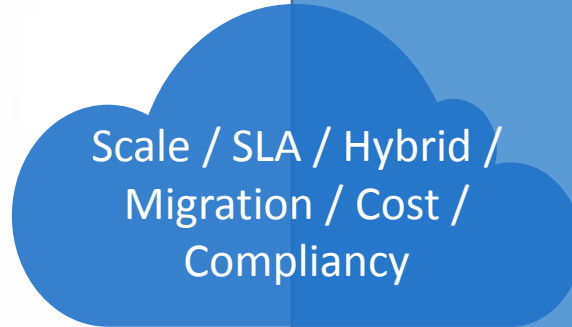
Back Office



€€



Fast / New



Scale / SLA / Hybrid / Migration / Cost / Compliancy



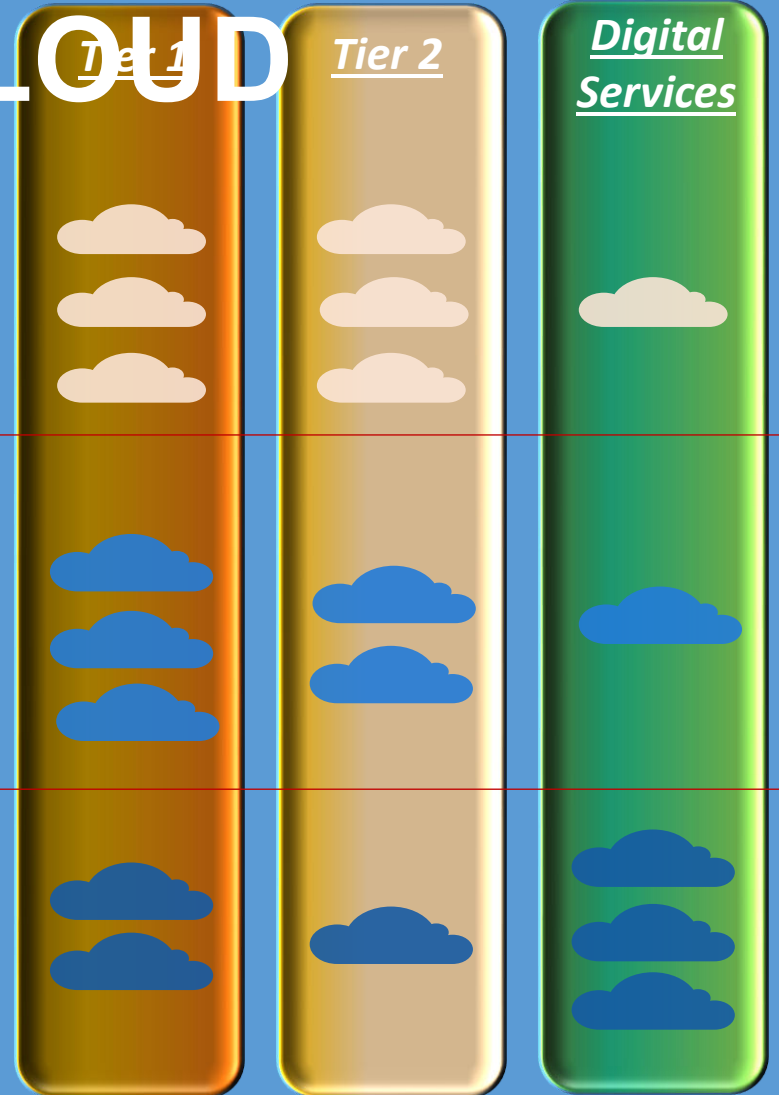
Easy to Use / Cost / Performance

DIVERSITY OF CLOUD

Tier 1

Tier 2

Digital Services



Cloud Providers Transformation

CSP, MSP, Hoster of Hosters

CSP CHALLENGES

More Services

More Innovation

Technology Investment



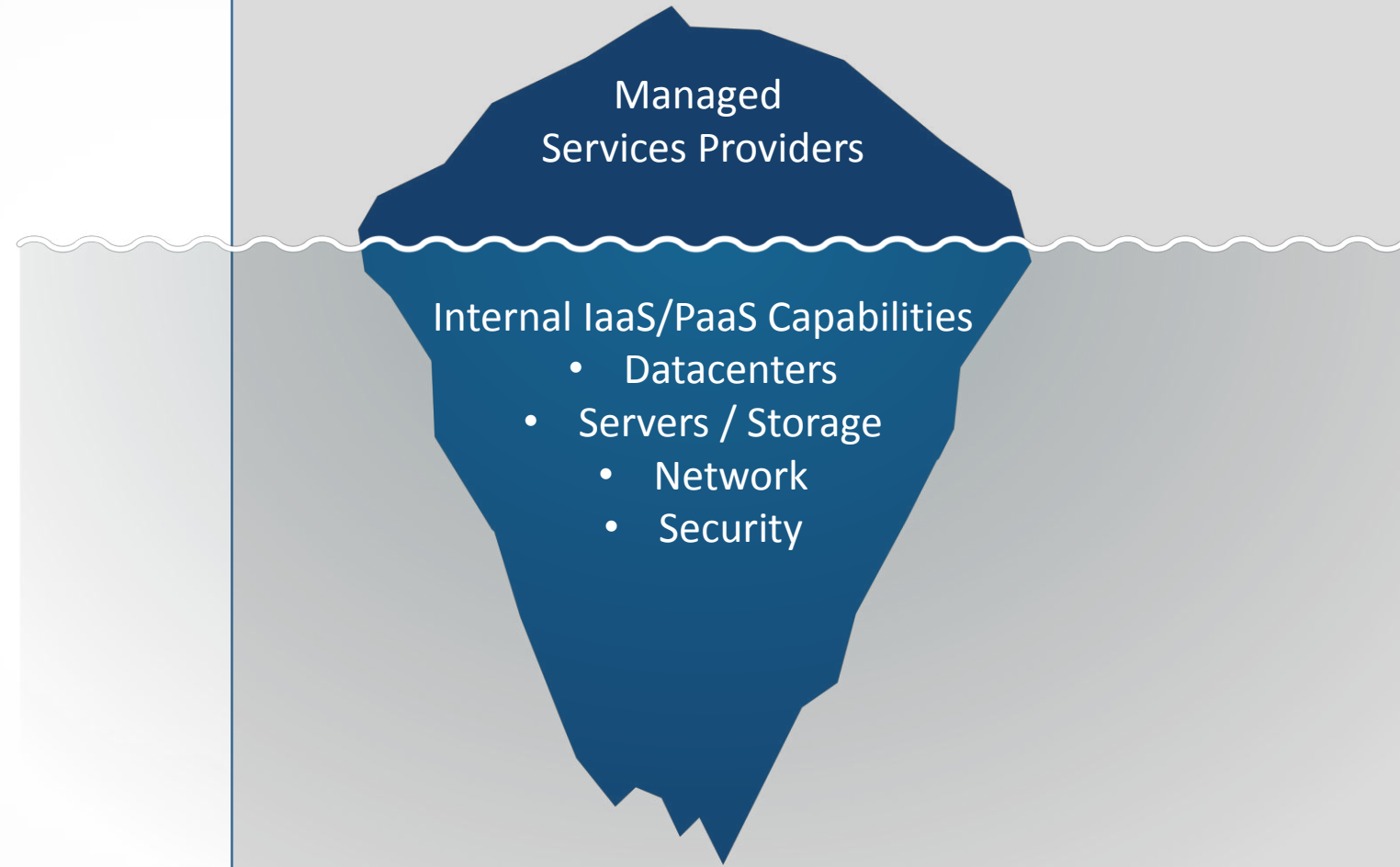
The diagram features a dark blue iceberg floating on a light blue wavy line representing the water surface. The top, smaller portion of the iceberg is labeled 'Managed Services Providers'. The larger, submerged portion is labeled 'Internal IaaS/PaaS Capabilities' and contains a bulleted list of infrastructure components: 'Datacenters', 'Servers / Storage', 'Network', and 'Security'.

Managed
Services Providers

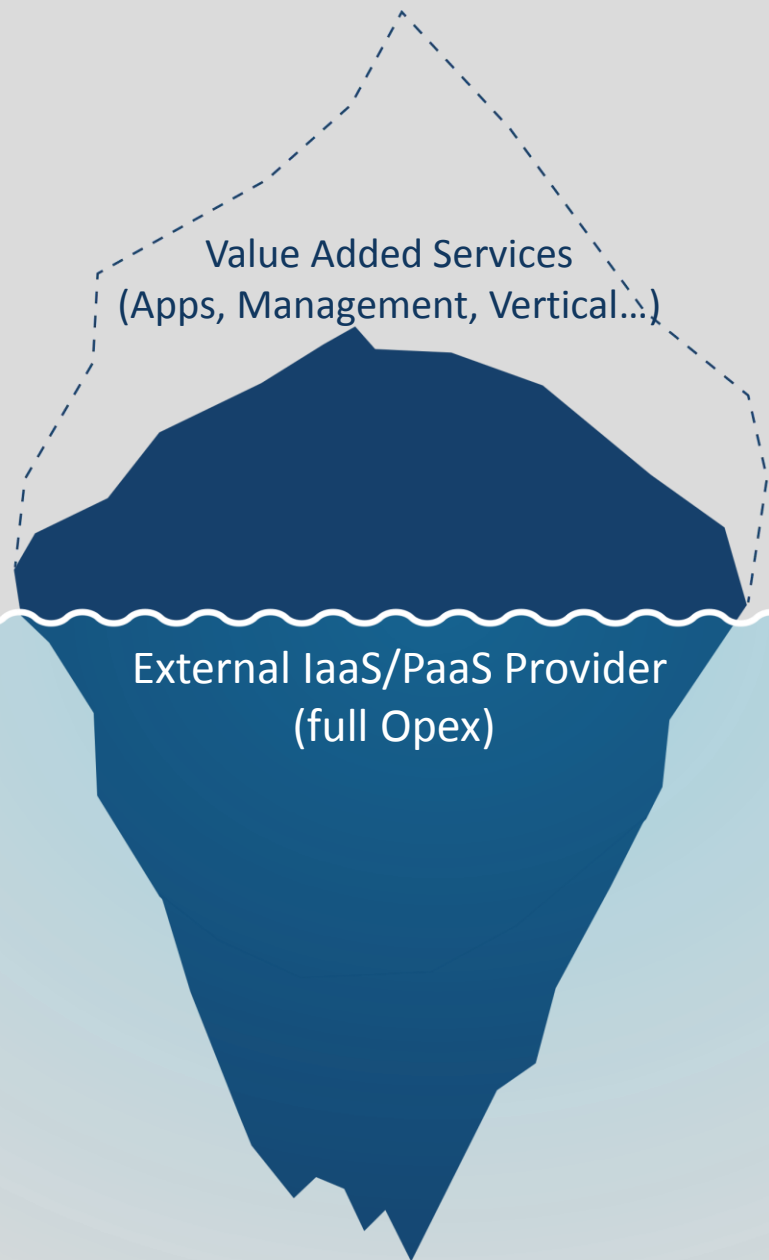
Internal IaaS/PaaS Capabilities

- Datacenters
- Servers / Storage
- Network
- Security

DILEMA "CAPEX" or "OPEX"



OPPORTUNITY FOR GROWTH ON ADDED VALUE SERVICES



Emerging of a new model: Hoster of Hosters

IaaS / PaaS Provider

- HyperScale
- Automated
- Open Standards
- Cost Competitive

INDUSTRY CONCENTRATION OF INFRASTRUCTURE PROVIDERS

CSP Leaders will continue to grow > 30% CAGR



Small providers will be hosted by specialized Leaders

USA (HQ)



aws

Azure



Google Cloud Platform

IBM Cloud

Europe (HQ)



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China (HQ)

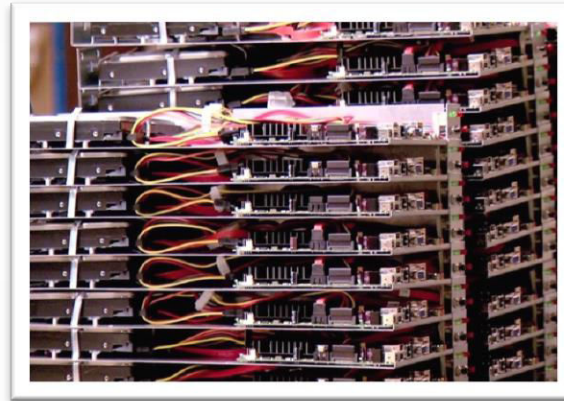


Alibaba Cloud

OVH positioning in the Cloud market

OVH : a Global provider of hyper-scale cloud

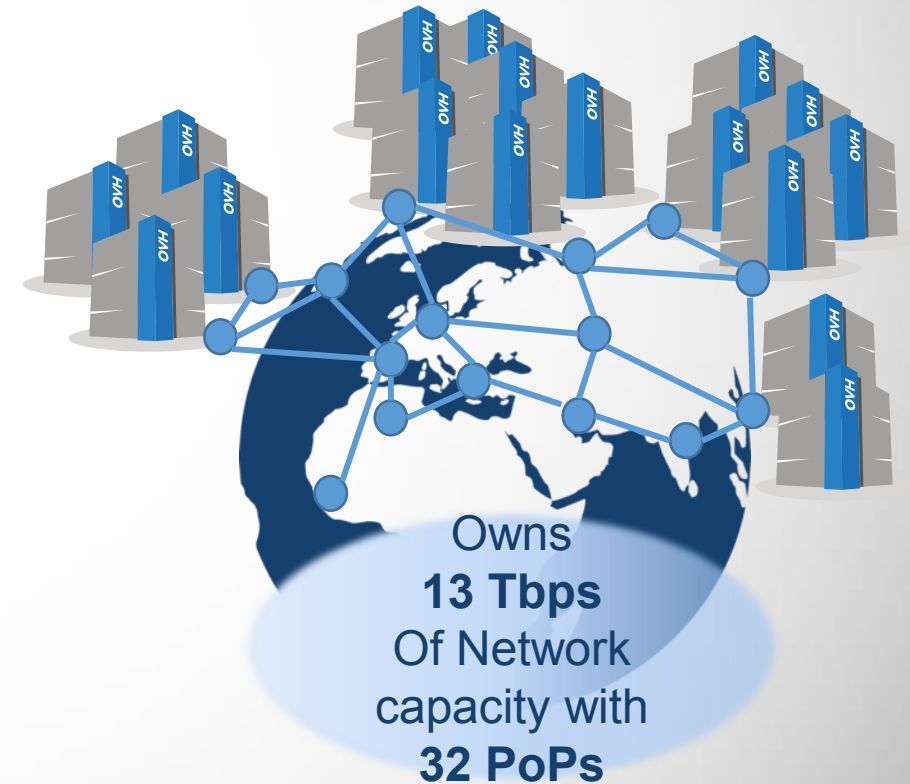
OVH owns its Data Centers and Servers



Owens 27 datacenters
in 12 locations and
4 continents

Hosting capacity : **1.3 million
physical servers**
300,000+ already deployed

OVH owns its Network



Owens
13 Tbps
Of Network
capacity with
32 PoPs

OVH at a Glance



Started in 1999



Current investment
plan of **€1.5 B**



2,500 employees in **18 Countries** (Europe, Africa, North America, APAC)

In 2016 : KKR &
Towerbrook acquired
a minority stake
for € 250m

KKR

TOWERBROOK

Why is OVH different?



100% standard technologies



Only **2 minutes** to deliver a server

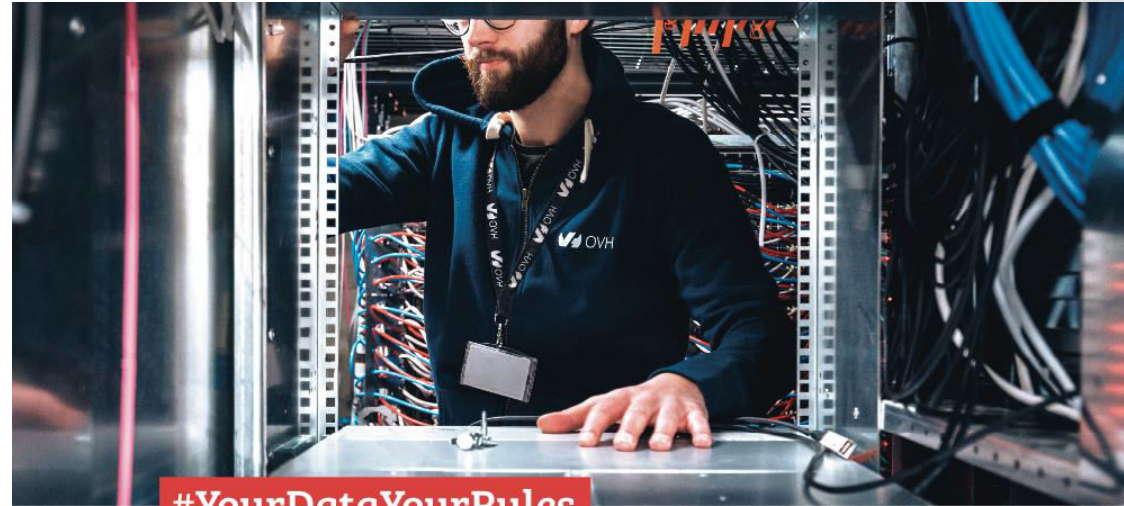
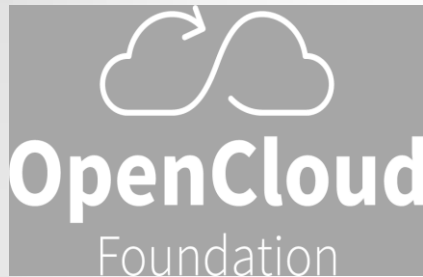


Building Servers and Datacenters



All inclusive pricing

OVH : a Committed Partner



#YourDataYourRules

Keeping you in control of your data

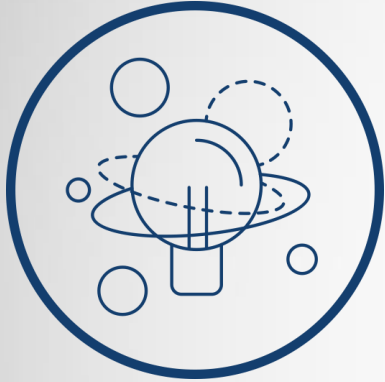
At OVH, we strongly believe that companies must remain free to make their own choices. Free to choose the geographical location of their data. Free to choose and change their cloud provider. Free to get their data out in the future, without being subject to vendor lock-in.

Discover the European vision of the cloud by OVH
www.keepdatacontrol.cloud



OVH SAS with a capital of 492 744 000. RCS Lille Métropole B 441 744 000. Photographie Olivier Renard / Fotolia

Who are we addressing?



STARTUPS
&
DIGITAL NATIVES



SMB



LARGE
ACCOUNTS



WEB HOSTERS
& MSP

Direct and Indirect channels



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