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Public Cloud Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented by Deployment (Software-as-a-Service (SaaS), Platform-as-a-Service (PaaS), Infrastructure-as-a-Service (IaaS)), by Organization Size (Small and Medium Enterprise, Large Enterprise), by End-user Industry (BFSI, Healthcare, Government, Manufacturing, IT and Telecom), By Region and Competition, 2019-2029F

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Abstracts

Global Public Cloud Market was valued at USD 510.82 Billion in 2023 and is anticipated t%ll%project robust growth in the forecast period with a CAGR of 15.27% through 2029. The public cloud market encompasses a broad spectrum of cloud computing services and solutions provided by third-party vendors over the internet. In essence, it involves the delivery of computing resources—including virtual machines, storage, databases, networking, and software applications—via shared data centers operated by cloud service providers (CSPs). These services are made available t%ll%businesses, organizations, and individuals on a pay-as-you-g%ll%or subscription basis, eliminating the need for organizations t%ll%invest in and maintain their own physical infrastructure.

Key characteristics of the public cloud market include scalability, flexibility, and accessibility. Public cloud services enable users t%ll%dynamically scale their computing resources up or down based on demand, allowing organizations t%ll%respond quickly t%ll%changing business needs and fluctuations in workload. This elasticity is particularly advantageous for businesses experiencing seasonal peaks, rapid growth, or unpredictable demand patterns.

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The public cloud offers a high degree of flexibility in terms of service selection and deployment models. CSPs typically offer a wide range of services, from basic infrastructure services (IaaS) like virtual machines and storage, t%II%platform services (PaaS) such as databases and development environments, and software services (SaaS) including productivity tools and customer relationship management (CRM) software. Users can choose and combine these services t%II%build custom IT environments tailored t%II%their specific requirements without the constraints of physical infrastructure limitations.

Accessibility is another hallmark of the public cloud market. Cloud services are accessed over the internet from any location with an internet connection, enabling remote work, collaboration, and data access on a global scale. This accessibility supports modern work trends such as remote and hybrid work models, allowing organizations t%II%maintain productivity and operational continuity regardless of physical location.

Security and compliance are critical considerations within the public cloud market. Leading CSPs invest heavily in security measures, including data encryption, identity and access management (IAM), network security, and compliance certifications t%II%protect sensitive data and ensure regulatory compliance across various industries and geographies. These measures address concerns related t%II%data privacy, confidentiality, and integrity, fostering trust and confidence among cloud users.

The public cloud market is characterized by ongoing innovation and competition among CSPs. Providers continually introduce new services, features, and pricing models t%II%differentiate themselves and meet evolving customer demands. This competitive landscape drives technological advancements in areas such as AI and machine learning, edge computing, serverless computing, and containerization, expanding the capabilities and potential applications of cloud computing across industries.

The public cloud market represents a dynamic and rapidly evolving ecosystem of cloud-based services that empower organizations t%II%leverage scalable, flexible, and accessible computing resources over the internet. As digital transformation accelerates and businesses increasingly rely on cloud technologies t%II%drive innovation and agility, the public cloud market continues t%II%play a pivotal role in shaping the future of IT infrastructure and enabling organizations t%II%achieve their strategic objectives efficiently and cost-effectively.

Key Market Drivers

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Scalability and Flexibility Requirements Driving Adoption

One of the primary drivers propelling the growth of the public cloud market is the scalability and flexibility it offers t%ll%businesses of all sizes across various industries. As organizations increasingly rely on digital transformation t%ll%remain competitive, the ability t%ll%scale IT infrastructure seamlessly and adapt t%ll%fluctuating demands becomes crucial. Public cloud providers offer scalable solutions that allow businesses t%ll%rapidly increase or decrease computing resources, storage, and bandwidth based on current needs. This scalability is particularly beneficial for enterprises experiencing seasonal spikes in demand or those expanding their operations globally without investing heavily in physical infrastructure.

The flexibility provided by public cloud services enables organizations t%ll%innovate more rapidly and respond swiftly t%ll%market changes. Cloud platforms offer a wide range of services, including compute instances, storage options, databases, AI tools, and more, that can be easily integrated int%ll%existing IT environments. This flexibility empowers businesses t%ll%deploy new applications quickly, experiment with emerging technologies, and deliver enhanced services t%ll%customers without the constraints of traditional on-premises infrastructure.

The pay-as-you-g%ll%pricing model inherent in public cloud services aligns operational expenses with actual usage, offering cost-efficiency and financial predictability. Organizations can avoid upfront capital expenditures on hardware and software, instead opting for operational expenditures that scale with business growth. This financial flexibility allows businesses t%ll%allocate resources strategically, invest in innovation, and reallocate savings t%ll%other critical areas of their operations.

The scalability, flexibility, and cost-efficiency offered by public cloud providers are significant drivers accelerating adoption across industries. As businesses continue t%ll%prioritize agility, innovation, and cost optimization in today's competitive landscape, the public cloud market remains poised for continued growth and evolution.

Digital Transformation Initiatives and Hybrid Cloud Adoption

Another key driver shaping the public cloud market is the ongoing wave of digital transformation initiatives undertaken by enterprises worldwide. Businesses are increasingly embracing cloud computing as a foundational pillar of their digital strategies, leveraging cloud-native applications, data analytics, AI, and IoT t%ll%drive

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innovation and enhance operational efficiencies. Public cloud platforms provide the necessary infrastructure and tools t%ll%support these initiatives, enabling businesses t%ll%modernize legacy systems, improve agility, and deliver superior customer experiences.

The adoption of hybrid cloud architectures, which combine public cloud services with on-premises infrastructure or private cloud environments, is fueling market growth. Hybrid cloud solutions offer organizations greater flexibility and control over their IT resources, allowing them t%ll%leverage the scalability and cost-effectiveness of public clouds while retaining sensitive data and critical workloads on-premises for regulatory compliance or performance reasons. This hybrid approach enables seamless workload portability, enhanced security, and optimized resource utilization, supporting diverse business needs across industries such as finance, healthcare, and manufacturing.

Public cloud providers continue t%ll%innovate by expanding their global footprints and enhancing connectivity options through partnerships with telecommunications companies and network service providers. These efforts enable businesses t%ll%deploy applications closer t%ll%end-users, reduce latency, and improve performance for mission-critical workloads. Additionally, advancements in cloud management tools, automation, and orchestration capabilities simplify hybrid cloud deployments, making it easier for organizations t%ll%manage complex IT environments and maximize the benefits of both public and private cloud infrastructures.

The convergence of digital transformation initiatives and the adoption of hybrid cloud architectures are pivotal drivers driving growth in the public cloud market. As businesses seek t%ll%harness the power of cloud computing t%ll%drive innovation, improve operational efficiency, and maintain competitive advantage, public cloud providers play a crucial role in supporting these strategic objectives.

Emphasis on Data Security, Compliance, and Governance

Data security, compliance, and governance considerations represent another significant driver influencing the adoption of public cloud services, particularly among enterprises with stringent regulatory requirements and data privacy concerns. Public cloud providers invest heavily in robust security measures, including encryption, identity and access management (IAM), network security, and threat detection capabilities, t%ll%protect sensitive data and mitigate cybersecurity risks.

Public cloud platforms often adhere t%ll%industry standards and regulatory

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frameworks, such as GDPR, HIPAA, SOC 2, and PCI DSS, providing assurances t%ll%businesses that their data is managed in compliance with applicable laws and regulations. These certifications and compliance commitments enable organizations in highly regulated sectors, such as healthcare, finance, and government, t%ll%migrate sensitive workloads and applications t%ll%the cloud while maintaining regulatory compliance and data sovereignty.

Public cloud providers offer extensive auditing and monitoring tools that allow businesses t%ll%track and audit access t%ll%their data, detect unauthorized activities, and ensure adherence t%ll%internal security policies. This visibility and control enhance transparency and accountability, enabling organizations t%ll%enforce data governance policies effectively and maintain trust with customers, partners, and regulatory authorities.

The scalability and global reach of public cloud infrastructures enable businesses t%ll%implement disaster recovery and business continuity strategies more effectively. Cloud-based backup and recovery solutions provide resilient data protection against natural disasters, cyber attacks, and operational disruptions, ensuring uninterrupted service delivery and minimizing downtime.

The focus on data security, compliance, and governance is a critical driver driving the adoption of public cloud services among enterprises seeking t%ll%safeguard sensitive information, achieve regulatory compliance, and strengthen their overall cybersecurity posture. As data privacy regulations continue t%ll%evolve and cyber threats grow more sophisticated, public cloud providers' commitment t%ll%enhancing security capabilities and regulatory compliance remains pivotal in fostering trust and accelerating cloud adoption globally.

Key Market Challenges

Security and Compliance Concerns

One of the significant challenges facing the public cloud market revolves around security and compliance issues. As organizations increasingly migrate their workloads and sensitive data t%ll%public cloud environments, concerns about data security, privacy, and regulatory compliance become paramount. Public cloud providers typically offer robust security measures and compliance certifications, such as ISO 27001, SOC 2, and GDPR compliance, t%ll%address these concerns. However, ensuring the security of data stored and transmitted over the cloud remains a shared responsibility

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between the cloud provider and the organization.

One of the primary concerns is data breaches and unauthorized access t%ll%sensitive information. While public cloud providers invest heavily in security measures like encryption, multi-factor authentication, and network security protocols, breaches can still occur due t%ll%human error, malicious attacks, or vulnerabilities in shared infrastructure. Moreover, the complexity of managing security across multiple cloud environments, often referred t%ll%as cloud sprawl, poses additional challenges for organizations in maintaining consistent security controls and visibility.

Another critical aspect is regulatory compliance, especially for industries governed by stringent data protection laws such as healthcare (HIPAA) and finance (PCI-DSS). Organizations must ensure that their cloud deployments comply with these regulations, which often requires understanding where data is stored, how it is accessed, and ensuring that appropriate security measures are in place throughout its lifecycle.

Addressing these challenges requires a comprehensive approach t%ll%cloud security and compliance. Organizations need t%ll%implement robust security policies and access controls, conduct regular security audits and assessments, and ensure ongoing monitoring and incident response capabilities. Additionally, cloud providers and organizations must collaborate closely t%ll%enhance transparency, accountability, and trust in cloud services, thereby mitigating risks associated with data security and compliance in public cloud environments.

Data Governance and Management Complexity

Another significant challenge in the public cloud market is the complexity of data governance and management. With the proliferation of data across hybrid and multi-cloud environments, organizations face difficulties in maintaining data visibility, control, and governance. Effective data governance encompasses policies, processes, and technologies that ensure data quality, integrity, accessibility, and security throughout its lifecycle.

One of the key challenges is data integration and interoperability across disparate cloud platforms and on-premises systems. Different cloud providers may use proprietary formats, APIs, and data management tools, making it challenging t%ll%achieve seamless data migration and interoperability. This can lead t%ll%data silos, where valuable insights are trapped within specific cloud environments, hindering organizations' ability t%ll%derive holistic business intelligence and analytics.

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Ensuring data sovereignty and compliance with regional data residency requirements adds another layer of complexity. Many countries have strict regulations governing where data can be stored and processed, necessitating careful planning and coordination when deploying workloads in public cloud environments with global footprints.

Managing data lifecycle management, including data retention, archiving, and deletion policies, poses challenges for organizations in maintaining compliance, optimizing storage costs, and ensuring data availability when needed. The complexity is further compounded by the exponential growth of data volumes and the need for scalable storage solutions that can accommodate diverse data types and access patterns.

T%lI%address these challenges, organizations must adopt robust data governance frameworks, including data classification, metadata management, and access control policies. Implementing data management solutions that offer visibility, automation, and orchestration capabilities can help streamline data operations and ensure compliance with regulatory requirements. Furthermore, leveraging cloud-native data services and solutions that support interoperability and data portability across cloud environments can simplify data integration and management complexities, enabling organizations t%lI%derive maximum value from their cloud investments while mitigating risks associated with data governance in public cloud environments.

Key Market Trends

Hybrid and Multi-Cloud Adoption Driving Flexibility and Scalability

A prominent trend in the public cloud market is the increasing adoption of hybrid and multi-cloud strategies by enterprises seeking greater flexibility, scalability, and resilience in their IT infrastructure. Hybrid cloud environments integrate on-premises infrastructure with public cloud services, allowing organizations t%lI%leverage the benefits of both environments while maintaining control over sensitive data and applications. This approach enables seamless workload portability, workload balancing, and disaster recovery capabilities across different cloud platforms.

Multi-cloud strategies involve using multiple cloud providers t%lI%avoid vendor lock-in, optimize costs, and leverage specialized services offered by different providers. Organizations benefit from the ability t%lI%choose the best-in-class services for specific business needs, such as AI/ML, big data analytics, or IoT, from different cloud

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providers. This diversity als%ll%enhances resilience against outages and ensures compliance with data sovereignty regulations by distributing workloads across geographically dispersed cloud regions.

The rise of containerization and microservices architectures further accelerates hybrid and multi-cloud adoption. Containers enable developers t%ll%build, deploy, and manage applications consistently across diverse cloud environments, promoting agility and scalability. Kubernetes, an open-source container orchestration platform, has become instrumental in managing containerized applications across hybrid and multi-cloud infrastructures, driving operational efficiency and accelerating digital transformation initiatives.

As organizations continue t%ll%prioritize agility, cost optimization, and resilience in their IT strategies, hybrid and multi-cloud adoption is expected t%ll%remain a dominant trend in the public cloud market. Cloud providers are responding by enhancing interoperability, security, and management tools t%ll%support seamless integration and orchestration across heterogeneous cloud environments. This trend underscores the growing maturity of cloud computing as a foundational element of modern IT infrastructures, enabling enterprises t%ll%innovate and compete more effectively in a rapidly evolving digital landscape.

Increasing Embrace of Serverless Computing for Efficiency and Cost Savings

Another significant trend shaping the public cloud market is the increasing adoption of serverless computing architectures, als%ll%known as Function as a Service (FaaS). Serverless computing abstracts infrastructure management tasks, allowing developers t%ll%focus solely on writing and deploying code in the form of discrete functions. Cloud providers automatically manage the underlying infrastructure, including server provisioning, scaling, and maintenance, based on the execution of these functions.

The appeal of serverless computing lies in its ability t%ll%improve developer productivity, accelerate time-to-market, and optimize costs by charging only for the actual compute resources consumed during function execution. This pay-as-you-g%ll%model eliminates the need for provisioning and maintaining idle server capacity, making it particularly attractive for event-driven and unpredictable workloads.

Serverless architectures promote scalability and elasticity, automatically scaling functions in response t%ll%changes in workload demand without manual intervention. This capability enables applications t%ll%handle sudden spikes in traffic efficiently,

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ensuring seamless user experiences during peak periods without overprovisioning resources.

The integration of serverless with emerging technologies such as AI/ML and IoT enhances its applicability across diverse use cases. For example, organizations can leverage serverless computing t%ll%deploy AI inference models for real-time data analysis or process sensor data from IoT devices in a cost-effective and scalable manner.

As enterprises seek t%ll%optimize operational efficiency, reduce infrastructure management overhead, and innovate rapidly, serverless computing is expected t%ll%gain traction across industries. Cloud providers are expanding their serverless offerings and enhancing support for popular programming languages, frameworks, and integrations t%ll%meet growing market demand. This trend underscores the transformative impact of serverless architectures on application development and deployment practices in the public cloud ecosystem.

Enhanced Focus on Cloud Security and Compliance

A critical trend influencing the public cloud market is the heightened focus on cloud security and compliance as organizations migrate sensitive workloads and data t%ll%cloud environments. Security concerns, including data breaches, unauthorized access, and compliance violations, remain top priorities for enterprises navigating the complexities of cloud adoption.

Cloud providers are responding t%ll%these challenges by investing heavily in robust security measures, including encryption, identity and access management (IAM), network security, and threat detection and response capabilities. Additionally, advancements in AI and machine learning enable proactive threat detection and automated incident response, bolstering the overall security posture of cloud environments.

Regulatory compliance requirements such as GDPR, CCPA, HIPAA, and PCI-DSS impose stringent guidelines on data protection and privacy, further driving the demand for secure and compliant cloud solutions. Cloud providers are enhancing their compliance certifications and offering specialized services t%ll%help customers achieve and maintain regulatory compliance across geographies and industries.

The shift towards zero-trust security models, which assume that every user and device

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accessing the cloud environment is potentially hostile, is gaining traction. Zero-trust architectures emphasize continuous verification of identities, strict access controls, and least privilege principles t%II%mitigate the risk of insider threats and unauthorized access.

As enterprises navigate complex regulatory landscapes and increasingly sophisticated cyber threats, cloud providers are evolving their security strategies t%II%offer comprehensive, integrated, and customizable security solutions. The partnership between cloud providers and customers in securing cloud environments is crucial, fostering a shared responsibility model where both parties collaborate t%II%protect data, applications, and infrastructure in the cloud.

The public cloud market is shaped by evolving trends such as hybrid and multi-cloud adoption, serverless computing for efficiency, and enhanced focus on cloud security and compliance. These trends reflect the growing maturity and diversification of cloud services, enabling organizations t%II%innovate, scale, and secure their digital operations effectively in a competitive global landscape.

Segmental Insights

Deployment Insights

Software-as-a-Service (SaaS) segment held the largest market share in 2023. The Public Cloud market, specifically within the Software-as-a-Service (SaaS) segment, is driven by several key factors that underscore its rapid growth and adoption across various industries. One of the primary drivers is the shift towards digital transformation among enterprises worldwide. Businesses are increasingly moving away from traditional on-premises software solutions towards cloud-based SaaS applications. This transition allows organizations t%II%leverage scalable and flexible software solutions hosted on public cloud platforms, eliminating the need for extensive hardware infrastructure and reducing IT overhead costs.

The scalability and agility offered by SaaS solutions in the public cloud are significant drivers of market growth. SaaS applications enable businesses t%II%quickly deploy and scale software resources based on fluctuating demand and business needs. This flexibility is particularly advantageous for organizations experiencing rapid growth or seasonal variability in their operations, as it allows them t%II%adapt and innovate more swiftly without the constraints of traditional software deployment cycles.

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Cost efficiency plays a crucial role in driving adoption within the SaaS segment of the public cloud market. By migrating t%ll%SaaS solutions hosted on public cloud platforms, businesses can achieve cost savings through reduced upfront capital expenditures on software licenses and hardware infrastructure. Furthermore, the pay-as-you-g%ll%pricing models offered by many SaaS providers enable organizations t%ll%pay only for the resources and features they use, optimizing IT spending and enhancing financial predictability.

Another significant driver is the increasing focus on collaboration and remote work capabilities. The global shift towards hybrid work environments and the rise of remote workforces necessitate robust collaboration tools and applications accessible from anywhere, at any time. SaaS solutions hosted in the public cloud facilitate seamless collaboration among distributed teams through features such as real-time document editing, vide%ll%conferencing, and project management tools, enhancing productivity and efficiency across organizations.

The demand for innovation and competitiveness is propelling businesses towards SaaS solutions in the public cloud. SaaS providers continuously update and enhance their applications with new features, functionalities, and integrations, enabling businesses t%ll%stay ahead in a fast-paced digital landscape. These continuous updates ensure that organizations have access t%ll%the latest technologies and capabilities without the burden of managing software upgrades or maintaining legacy systems.

Regulatory compliance and data security are critical drivers influencing SaaS adoption in the public cloud. Leading SaaS providers adhere t%ll%stringent security standards and compliance certifications, offering robust data protection measures and ensuring data sovereignty for organizations operating in diverse regulatory environments. This commitment t%ll%security and compliance alleviates concerns related t%ll%data breaches and regulatory penalties, thereby fostering trust and confidence among enterprises migrating their operations t%ll%the public cloud.

The SaaS segment within the Public Cloud market is driven by digital transformation initiatives, scalability and agility benefits, cost efficiencies, collaboration needs, innovation demands, and stringent security and compliance requirements. As businesses continue t%ll%prioritize flexibility, efficiency, and innovation in their operations, the adoption of SaaS solutions hosted on public cloud platforms is expected t%ll%grow, shaping the future of enterprise software deployment and usage worldwide.

Regional Insights

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North America region held the largest market share in 2023. The Public Cloud market in North America is driven by several compelling factors that reflect the region's leadership in digital transformation, technological innovation, and economic efficiency. One of the primary drivers is the increasing adoption of cloud computing across enterprises of all sizes and industries. Organizations are increasingly migrating their IT infrastructure, applications, and data t%ll%public cloud platforms t%ll%leverage scalability, flexibility, and cost-efficiency advantages. Public cloud providers offer on-demand access t%ll%computing resources such as virtual machines, storage, and networking, enabling businesses t%ll%scale operations rapidly and respond swiftly t%ll%changing market demands without significant upfront investments in hardware or maintenance costs.

The COVID-19 pandemic has accelerated the shift towards remote work and digital collaboration, further driving demand for public cloud services. Enterprises relied on cloud-based solutions t%ll%support remote workforce operations, ensure business continuity, and facilitate seamless communication and collaboration among geographically dispersed teams. This increased reliance on cloud-based tools and platforms underscores the resilience and scalability of public cloud infrastructure in supporting diverse business needs, from vide%ll%conferencing and remote desktop solutions t%ll%data storage and cybersecurity measures.

The North American market benefits from a robust ecosystem of cloud providers, including industry giants like Amazon Web Services (AWS), Microsoft Azure, and Google Cloud Platform (GCP), which continually innovate and expand their service offerings. These providers invest heavily in enhancing cloud security, compliance certifications, and regulatory adherence, addressing concerns around data protection and privacy that are critical for enterprises operating in highly regulated industries such as finance, healthcare, and government.

The proliferation of data-intensive technologies such as artificial intelligence (AI), machine learning (ML), and big data analytics is driving significant growth in the public cloud market. Cloud platforms provide scalable compute and storage capabilities essential for processing and analyzing vast amounts of data, extracting actionable insights, and powering AI-driven applications across various sectors. Enterprises leverage these technologies t%ll%gain competitive advantages, optimize operations, personalize customer experiences, and innovate new products and services.

The public cloud market in North America is bolstered by government initiatives and incentives aimed at accelerating digital transformation and fostering innovation. Public

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sector organizations are increasingly adopting cloud-first strategies t%ll%modernize legacy IT systems, improve service delivery, and enhance citizen engagement. Government investments in cloud computing infrastructure and cybersecurity initiatives further stimulate market growth by promoting cloud adoption across federal, state, and local agencies.

The public cloud market in North America is driven by the widespread adoption of cloud computing across enterprises, accelerated digital transformation trends, increased reliance on remote work solutions post-pandemic, advancements in data-intensive technologies, and supportive government policies. As organizations continue t%ll%prioritize scalability, agility, and innovation in their IT strategies, the demand for robust and secure public cloud services is expected t%ll%grow, reinforcing North America's position as a key hub for cloud computing innovation and adoption globally.

Key Market Players

%ll%Amazon Web Services, Inc.

%ll%Alibaba Cloud

%ll%NetApp, Inc.

%ll%Microsoft Corporation

%ll%Oracle Corporation

%ll%SAP SE

%ll%IBM Corporation

%ll%Salesforce, Inc.

%ll%Broadcom Inc.

%ll%Adobe Inc.

Report Scope:

In this report, the Global Public Cloud Market has been segmented int%ll%the following

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categories, in addition t%ll%the industry trends which have als%ll%been detailed below:

%ll%Public Cloud Market, By Deployment:

Software-as-a-Service (SaaS)

Platform-as-a-Service (PaaS)

Infrastructure-as-a-Service (IaaS)

%ll%Public Cloud Market, By Organization size:

Small and Medium Enterprise

Large Enterprise

%ll%Public Cloud Market, By End-user Industry:

BFSI

Healthcare

Government

Manufacturing

IT and Telecom

%ll%Public Cloud Market, By Region:

North America

%ll%United States

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%ll%Canada

%ll%Mexico

Asia-Pacific

%ll%China

%ll%India

%ll%Japan

%ll%South Korea

%ll%Indonesia

Europe

%ll%Germany

%ll%United Kingdom

%ll%France

%ll%Russia

%ll%Spain

South America

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%ll%Argentina

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%ll%Saudi Arabia

%ll%South Africa

%ll%Egypt

%ll%UAE

%ll%Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Public Cloud Market.

Available Customizations:

Global Public Cloud Market report with the given market data, Tech Sci Research offers customizations according t%ll%a company's specific needs. The following customization options are available for the report:

Company Information

%ll%Detailed analysis and profiling of additional market players (up t%ll%five).

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