![MTN Consulting — Measuring markets]

Webscale Playbook: Tencent

Mega 'new infrastructure' plan to drive network spending amid U.S. sanctions

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Agenda

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Operational Scale

Tencent's extensive network includes 27 cloud regions globally, alongside 1,100 CDN nodes in mainland China that support diverse applications and services such as Tencent Cloud, WeChat/Weixin, Tencent Video, and Tencent Meeting.

27
Cloud regions

1 billion+
Monthly active users of Tencent Cloud *(as of Jul 2020)*

1,100
Content delivery network (CDN) cache nodes in mainland China

Tencent's Webscale Network Infrastructure Metrics

112 million
Subscribed users of video streaming platform, Tencent Video *(as of March 2020)*

1,206 mn
Combined monthly active users of messaging services, WeChat and Weixin *(as of June 2020)*
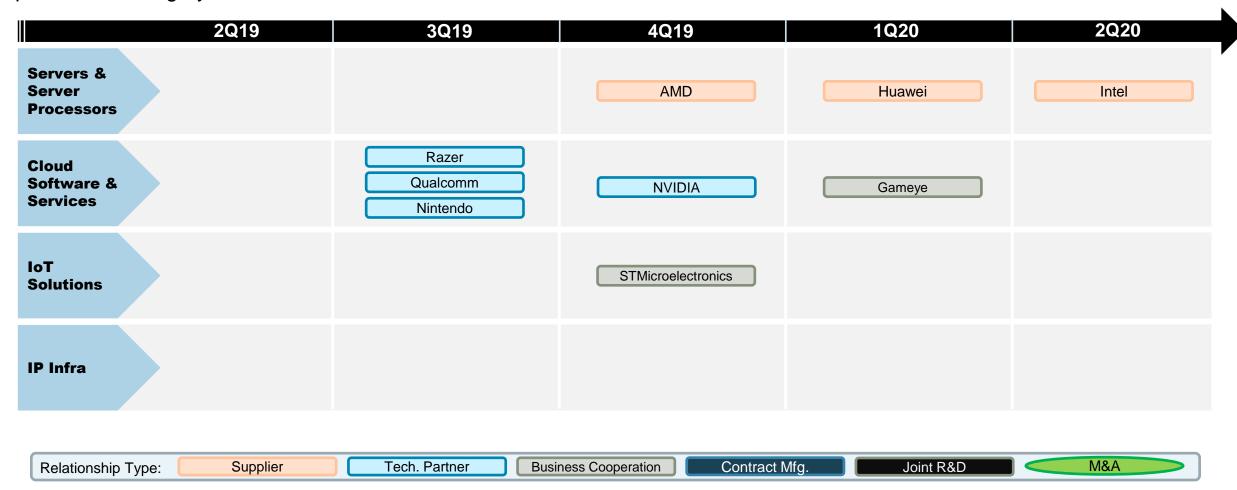
10 million
Daily active users of video conferencing app, Tencent Meeting *(as of March 2020)*

Source: Company website; Company annual reports

Key Technology Relationships* in Networks (1/2)

Tencent's emphasis on data center scalability and cloud gaming platforms is reflected in deals under the server & server processors category, and cloud software & services.

	2Q19	3Q19	4Q19	1Q20	2Q20
Servers & Server Processors			AMD	Huawei	Intel
Cloud Software & Services		Razer / Qualcomm / Nintendo	NVIDIA	Gameye	
IoT Solutions			STMicroelectronics		
IP Infra					

Relationship Type: Supplier | Tech. Partner | Business Cooperation | Contract Mfg. | Joint R&D | M&A

*For a detailed review of Tencent's technology relationships over a longer time series, refer to the latest edition of our *Webscale Network Supply Chain Analyzer*
^ **Deals with vendors marked with caret (^) symbol are "Current" or "Ongoing" in nature**