

Tencent 腾讯 | CSIG
云与智慧产业事业群

Cloud as New Driving Force

-Transformation of the Chinese Automotive Market

September 22, 2022

Potsdam



One of the most valuable tech companies in the world by market cap

“The World’s Biggest Tech Companies Are No Longer Just American”

The New York Times



Leading Services with Massive and Highly Engaged User Base

GAMES

- #1 by users in China across PC and mobile
- #1 globally by revenue

WEIXIN & WECHAT

- #1 mobile community
- MAU at 1,242m

QQ

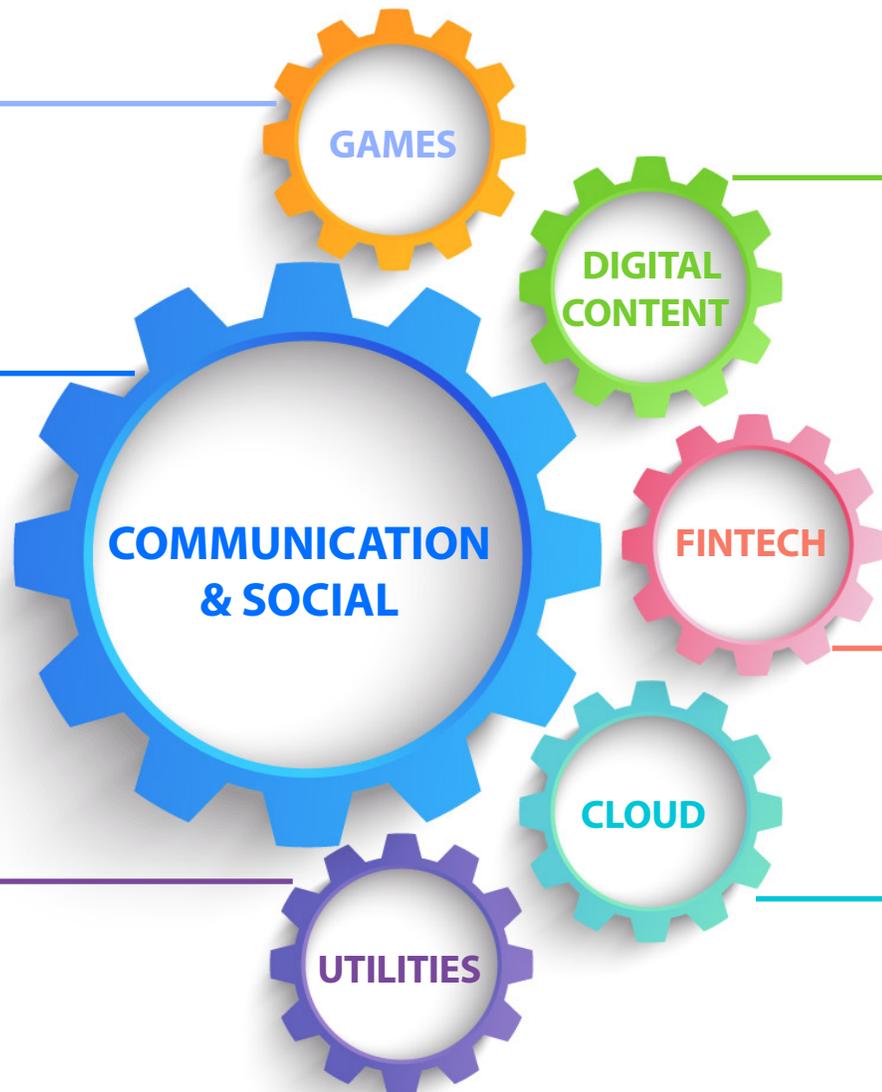
- QQ mobile device MAU at 606m

MOBILE BROWSER

- #1 by MAU

Mobile Security

- #1 by MAU



LONG FORM VIDEO

- #1 by subscription

NEWS

- #1 news services by MAU

MUSIC

- #1 music services provider

LITERATURE

- #1 online content library and publisher

MOBILE PAYMENT

- #1 by MAU & DAU

PUBLIC CLOUD

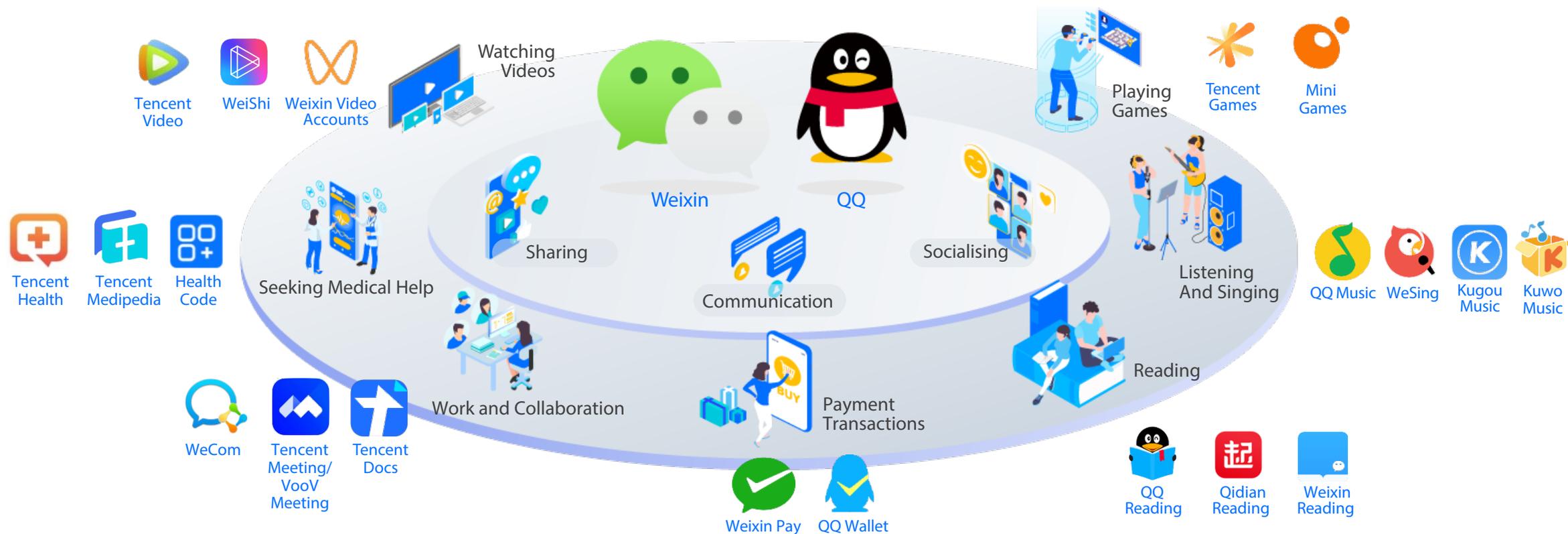
- #2 service provider by revenue

Digital Ecosystem Fulfilling Everyday Needs of Consumers

1 billion+
daily average commercial
payment transactions
on *Weixin Pay*⁽¹⁾

RMB 1.6 trillion+
total transaction value
generated from
Weixin Mini Programs⁽²⁾

226 million
total fee-based
VAS subscriptions⁽³⁾



Content

1. Progressive Development of Digitalization in China
2. Trends and Use Cases Based on Key Values of Digitalization
3. Cloud as New Rising Driving Force
4. Digitalization to Bring Next wave of 'Integration'

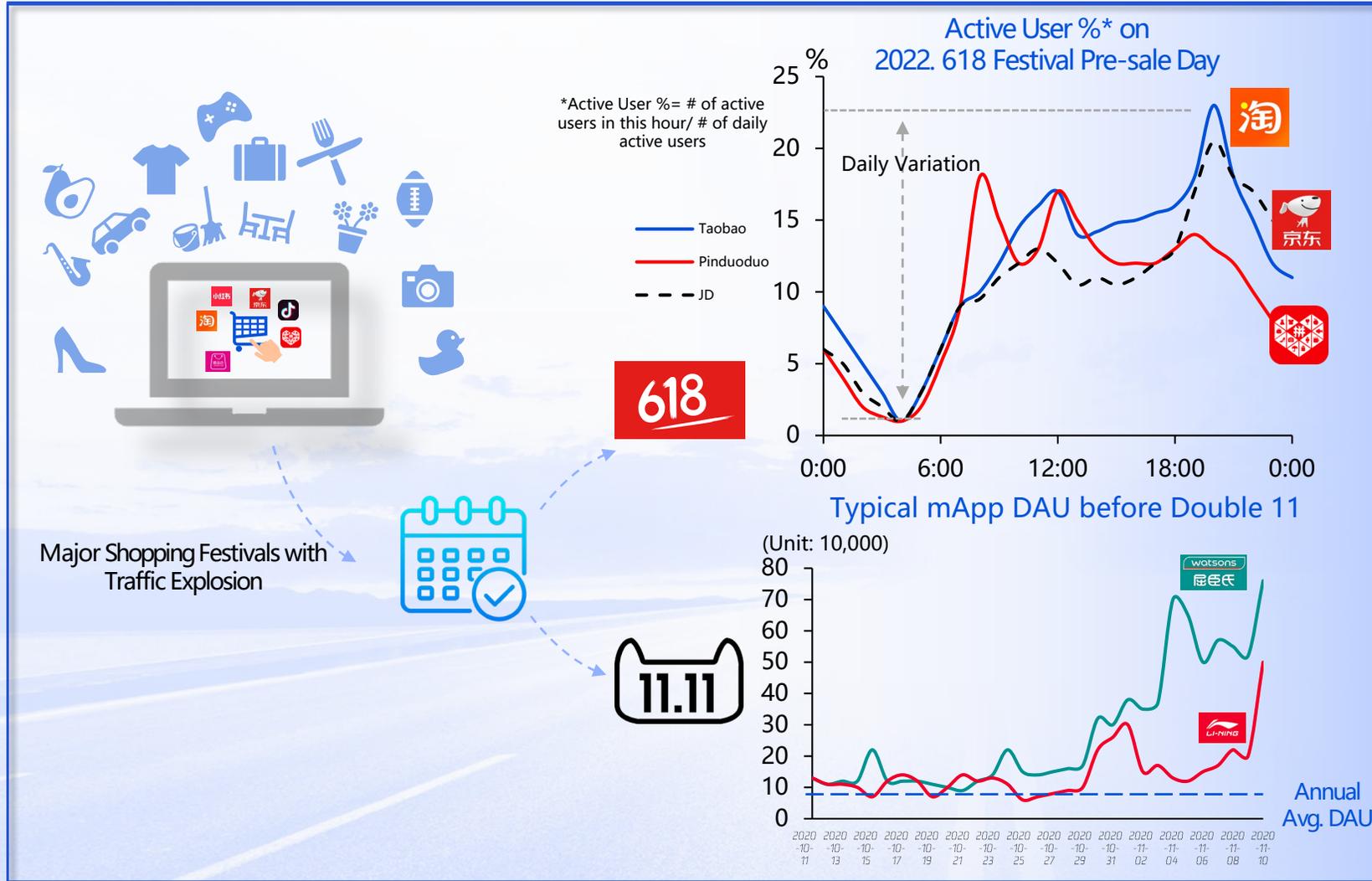
In China, digital business is of massive scale, requires fast reaction, but under extreme volatility – a DiDi e-hailing example



Data source: DiDi.

- E-hailing industry market size reached **300 Billion RMB** within a decade
- Digital ride-hailing platforms are serving **100 Millions** monthly active customers
- **Connecting, managing and analyzing** the data streams are challenging

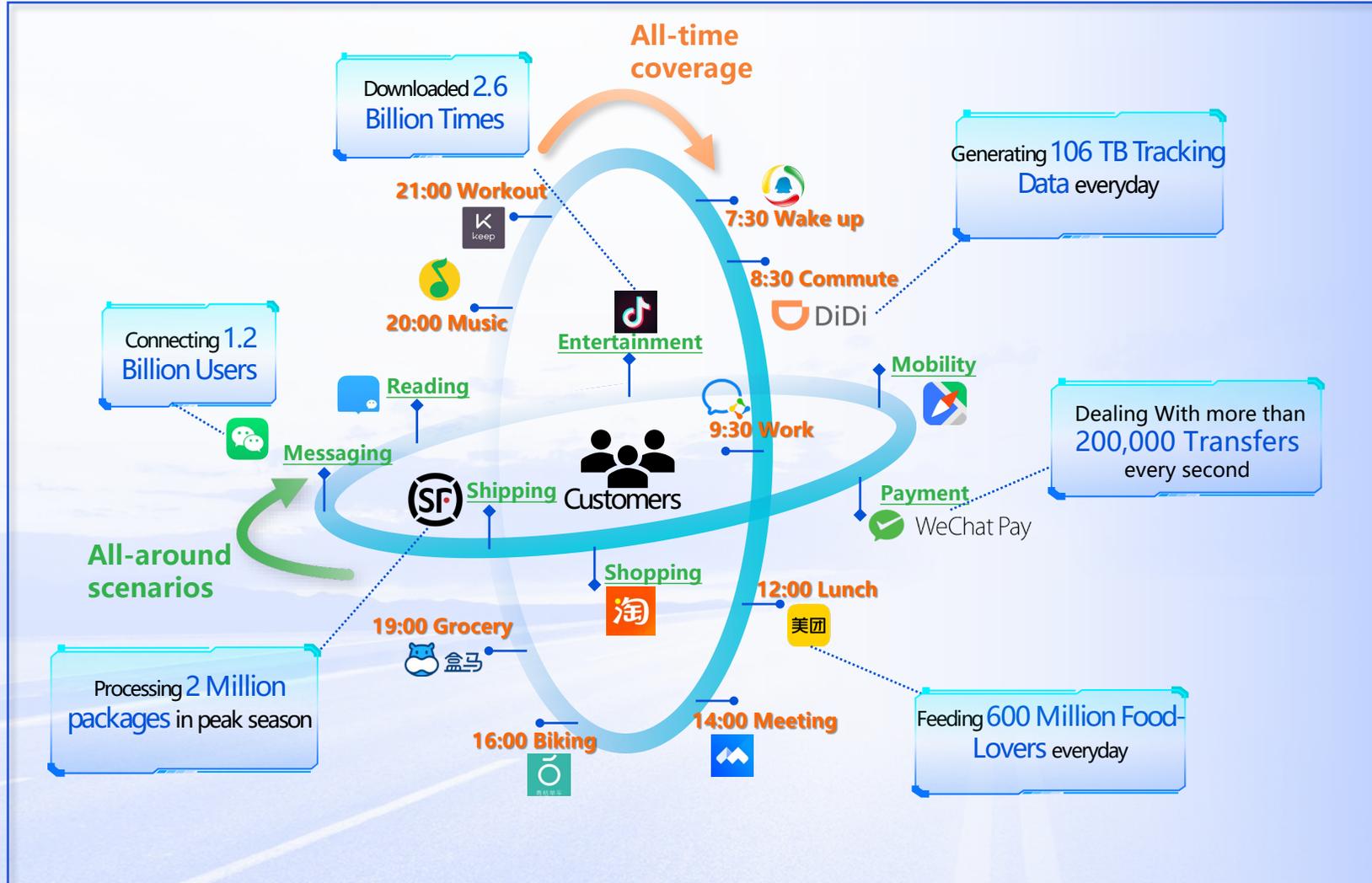
In e-commerce, we see similar phenomena around “shopping festivals” : large volume, fast reaction, high volatility



- Total sales of **8,5 Billion RMB** was recorded on 2021 Double 11 and **37 Million products** were sold on Taobao/Tmall
- The total turnover of Tmall during Double 11 is **~18 times** the average DAU
- Sudden high concurrency and fluctuating conditions needs to be addressed quickly, in order to secure operation



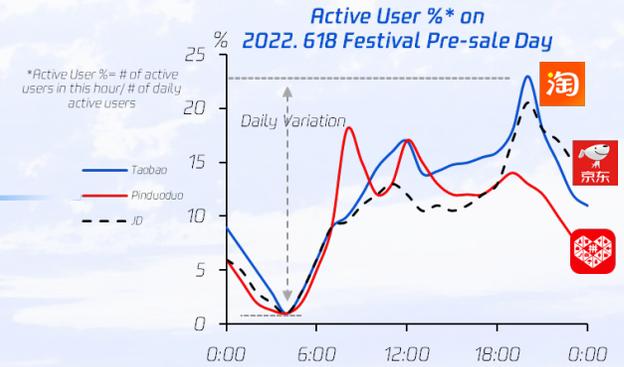
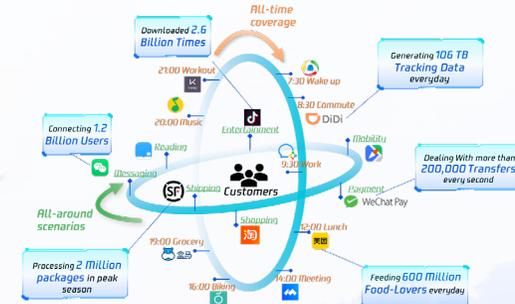
And Chinese consumers are surrounded by a large number of digital services, which are inter-linked through ecosystems



- Entire digital eco-systems was built around customers' need
- Customers can connect with real-life activities via digital gateways
- Digital tools enhance accessibility and bring massive choices



Our observations lead to 3 key values of digitalization



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User centric services with continuous brand presence



From >>

Product-centric service

>> To

User-centric service

“ NIO’ s Services & Community Benefits provide continuous services and satisfaction for customer needs ”

NIO APP
Trigger points for brands to link users



NIO House
VIP lounge clubhouse for NIO car owners



NIO Pilot
Selected Packages:
ACC, S-APA with Fusion, LKA, CTA-R, CTA-B, ALS, AHB



NIO Power
Mobile internet-based power solution battery charging and swap





The right service/content, at the right time to enhance experience



From >>

Fixed offering at delivery

>> To

Continuous update and personalization

“ Customized push based on user preference and scenario ”





Digital key brings convenience to control and sharing



From >>

**Physical and fixed
identification**

>> To

**Digital and flexible
identification**

“

Digital key in super app connects the user with the car and a full ecosystem around it”



Super-ID

Key sharing



Direct link between advertisement and CRM brings more sales efficiency



From >>

Broad and open marketing

>> To

Targeted and close-loop marketing and sales

“ Integrate advertisement into the natural flow of user behavior habits, and put next action just one-click away ”





Platform based approach shortens development time



From >>

One-by-one development and adaptation of digital services

>> To

Ecosystem adaptation all at once

“

Millions of applications available to car screens (thereof dozens of tailored ones) within 3-6 months with a developer team <5 FTE

”





Decoupling of platform and applications allow flexible development

From >>

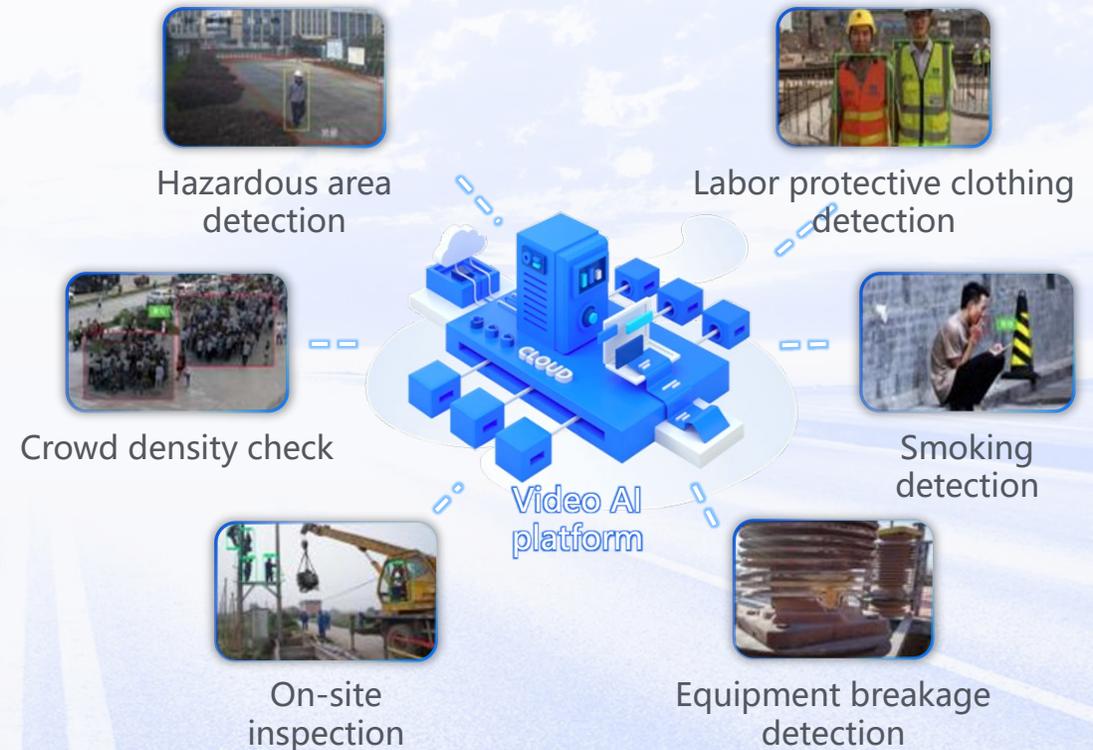
Closed-circle application development

>> To

Platform based and low-code application development

“

Establishing a Video AI Platform to pool all camera data in a production site allows fast and flexible development of new applications fit for different needs ”





Leverage trusted cloud to stay resilient to compliance need increase

From >>

**One-time
compliant set-up**

>> To

**Stay compliant over
time**

“

Regulatory requirements are tightening in China, esp. regarding personal and geo-locational data. Putting them into a trusted and certified cloud environment provides a guarantee to stay compliant,, over time.



Network security protection level



Trusted Cloud Service Certification



CAC cloud computing security assessment



ISO27001 Certification

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Global Cloud Infrastructure



26

Regions

70

Availability zones

65

Online

5

Partnerships

Tencent positions cloud as new workforce to connect, secure, and accelerate digital businesses

Customer Experience

Operation Efficiency

Business Resilience



Connect

Secure

Accelerate

Tencent Auto Intelligence

WeCom

Network security protection level

CAC cloud computing security assessment

Tencent LBS

Digital Key Ring

Trusted Cloud Service Certification

ISO27001 Certification

Tencent Intelligent Cockpit Solution --



2 developers



within 1 month



Cross-platform maintenance

Artificial Intelligence Acceleration Service --

Applicable scenarios: Recommendation, CV, NLP



Acceleration Library



Handy interface



Model Training

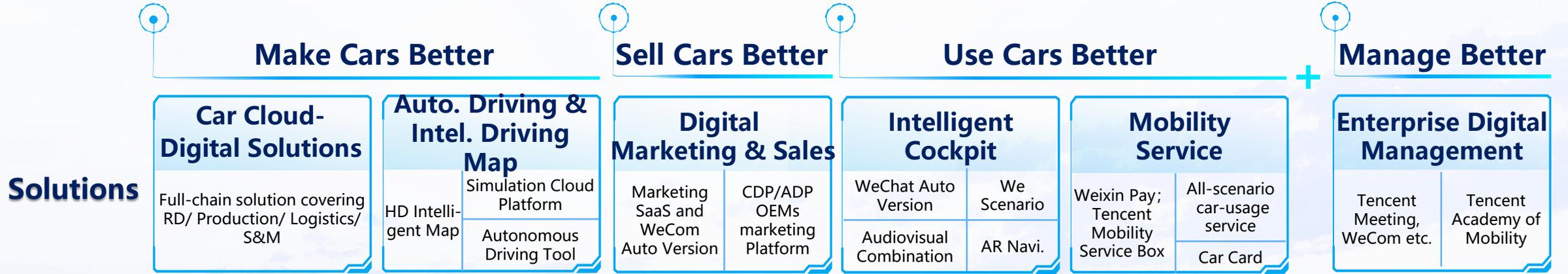
Tencent Intelligent Mobility: Co-create New Values for Mobility

Co-create new values for mobility

To C

To B

Technology



Technical basement

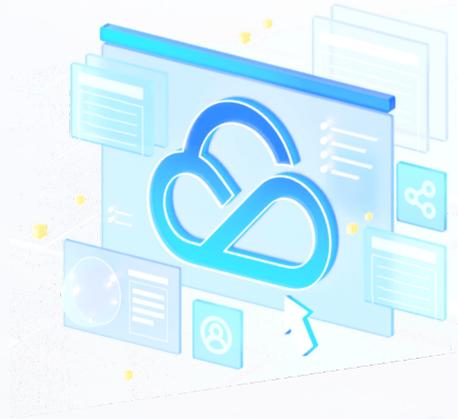


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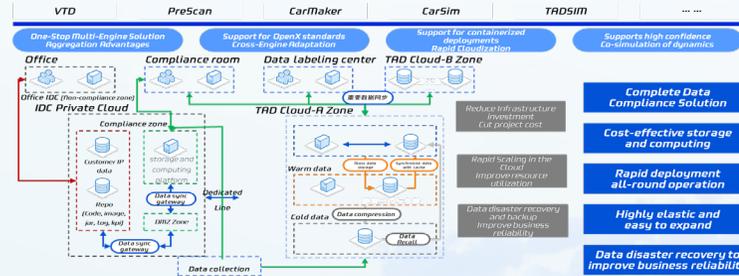
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Integration of Car and Cloud

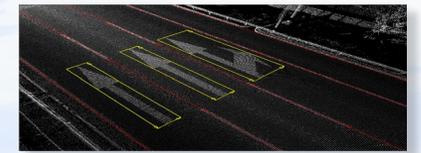
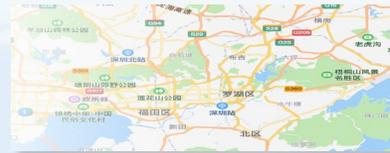


Autonomous Driving Cloud



Development and operation on cloud

Vehicle Map Cloud



Map integration (SD/ADAS/HD) and real-time adjustment on cloud

Intelligent Cockpit Cloud



Scenario and push engine on cloud



Integration of Real and Digital World



NFT solution

新春数字藏品抽奖
ID.4 CROZZ 活跃虎
一汽-大众数字藏品

年度之星专属数字藏品
活跃之星
一汽-大众数字藏品

元梦送藏品
一汽-大众 惊喜好礼
一汽-大众数字藏品

Digital Human

Intelligent Building and Park

登录鉴权 导航组态 指挥控制中心 告警联动中心

告警定位、回溯 各子系统联动控制界面

机电模型 空间数据 漫游巡检

腾讯智慧空间

Intelligent Driving Map

碰撞风险感知
Collision risk perception

正在躲避障碍
27米 障碍物

11 47 40

5008 障碍物

剩余3.4公里 6分钟

腾讯智慧空间



Integration of different kinds of players into one vast ecosystem



Business borders are blurred, OEMs, suppliers and tech companies are all in the same battlefield

Complementary, visionary, open and reliable partners are gold

Together we can set a win-win situation and co-create greater value

THANKS

Tencent 腾讯