Thomas Kurian
CEO
Google Cloud

Our Mission

Accelerate every organization's ability to transform through data-powered innovation with the best infrastructure, platform, industry solutions and expertise for digital transformation

Google Cloud Strategy

1

Distributed
Infrastructure
as a Service

2

Digital
Transformation
Platform

3

Industry-Specific
Digital
Transformation
Solutions

Distributed Infrastructure as a Service

Partner Solutions

| Compute | Storage | Network | Security | Management | DevOps tools |

Data Centers, Global Network Backbone & Regional Points of Presence

| **Public Cloud** | **Hybrid Cloud** | **Multi Cloud** | **Global Mobile Edge Cloud** |

Hewlett Packard Enterprise · DELL Technologies · Lenovo · CISCO · vmware · intel

Azure · Alibaba Cloud · aws

5G Network

Wireline

Anthos

Distributed Infrastructure as a Service: Why We Win

Why We Win

Best support for core enterprise workloads

Deeply integrated comprehensive cloud security

Best-in-class reliability & uptime

Open standards based hybrid & multi-cloud

Easy migration solutions & emerging technologies

Sample Customers

METRO

GENERALI

COLGATE-PALMOLIVE

McKESSON

FORTINET

McAfee
Together is power.

paloalto
NETWORKS

splunk>

CardinalHealth

PayPal

SIEMENS

Deutsche Börse Group

ANZ

KeyBank

BBVA

natura

WPP

THE HOME DEPOT

TARGET

opentext

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Digital Transformation Platform

Partner Solutions

| Application Development | Data Management | Smart Analytics | AI & Machine Learning | Collaboration |

Digital Transformation Platform

Distributed Infrastructure as a Service

Digital Transformation Platform: Why We Win

Why we win

Open Source application development

Scaled, real-time stream data management
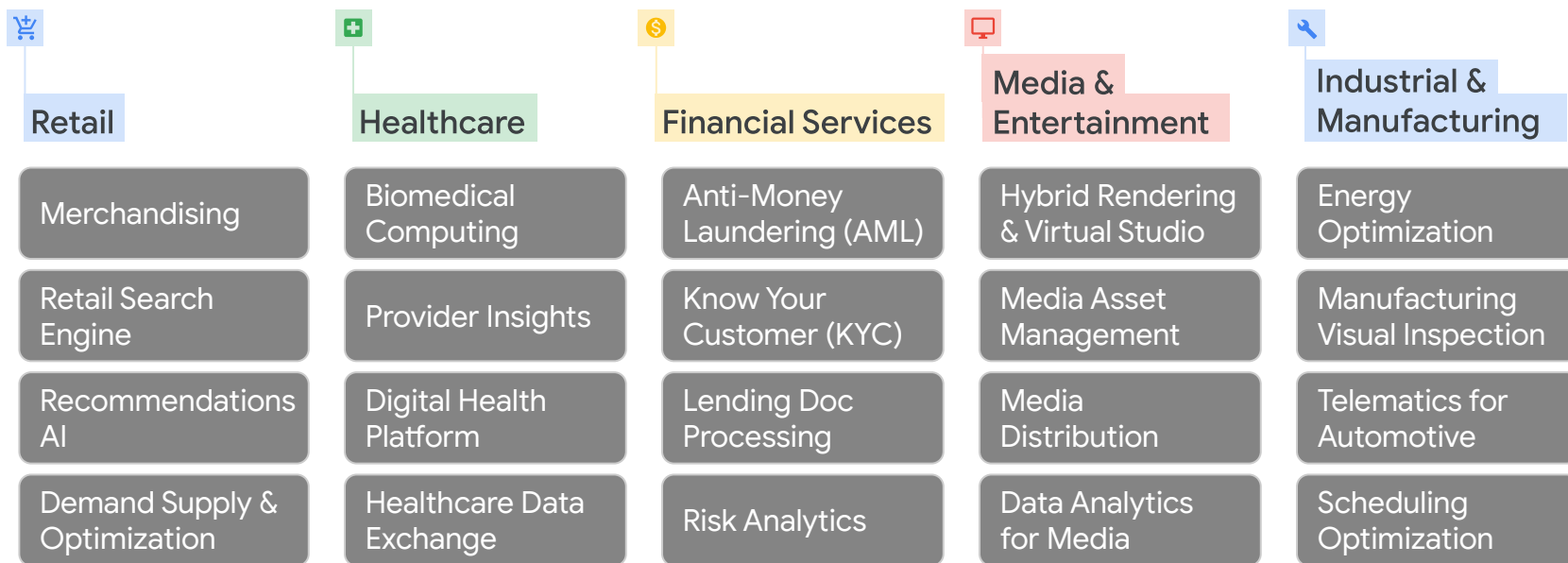
Large-scale Data Warehouse as a Service

Best-in class AI & Machine Learning platform

Collaboration with frontline from any device

Sample customers

telegraphmediagroup

unity

AutoTrader

NCR

UPS

ebay

METRO

HSBC

Whirlpool CORPORATION

P&G

LOWE'S

THE HOME DEPOT

AIRBUS

Etsy

hulu

Unilever

NETFLIX

nielsen

Carrefour

verizon✓

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Industry Specific Digital Transformation Solutions

Retail
- Merchandising
- Retail Search Engine
- Recommendations AI
- Demand Supply & Optimization

Healthcare
- Biomedical Computing
- Provider Insights
- Digital Health Platform
- Healthcare Data Exchange

Financial Services
- Anti-Money Laundering (AML)
- Know Your Customer (KYC)
- Lending Doc Processing
- Risk Analytics

Media & Entertainment
- Hybrid Rendering & Virtual Studio
- Media Asset Management
- Media Distribution
- Data Analytics for Media

Industrial & Manufacturing
- Energy Optimization
- Manufacturing Visual Inspection
- Telematics for Automotive
- Scheduling Optimization

Functional Solutions: Contact Center AI, Document Understanding AI

Business Application Platform

Line of Business Users

No Code Applications	APIs, Integration, Workflow	Collaboration	Business Intelligence
AppSheet	apigee	G Suite	looker

🛒 Retail   ➕ Healthcare   💲 Financial Services   🖥 Media & Entertainment   🔧 Industrial & Manufacturing

Existing Business Applications: ERP, CRM, ISVs, SaaS Vendors

Industry Specific Solutions: Why We Win

Why we win

Retail: Search & Forecasting AI, Behavioral Analytics

Healthcare: Genome Data Model, Healthcare AI

Financial Services: Document AI, AML/KYC, Risk Analytics

Media & Entertainment: Vision AI, Video AI, Object Recognition, Streaming

Manufacturing & Logistics: Optimization AI, Vision AI, Android Auto

Sample customers

macy's | TARGET | Morrisons | KOHL'S

NOVARTIS | MAYO CLINIC | SANOFI | American Cancer Society

HSBC | MACQUARIE | London Stock Exchange | NatWest

The New York Times | 20th Century Studios | telegraphmediagroup | DOW JONES

AIRBUS DEFENCE & SPACE | | LG CNS | AirAsia

Financial Performance

$10B

Google Cloud ended 2019 at a more than $10 billion run rate.

53%

Google Cloud revenues were up 53% in 2019; GCP growth meaningfully higher.

$50M

In 2019, the number of deals over $50 million more than doubled.

*"The traction we're having with large customers who are making multi-year commitments with us is reflected in our backlog, which ended the year at **$11.4 billion**, substantially all of which relates to Google Cloud."*
-   Ruth Porat, Alphabet CFO

Accelerating Growth: Summary

Expand our Total Addressable Market with focused product enhancements

Deepen our presence in the largest companies in 21 markets in 6 industries

Expand our direct sales team globally and focus on selling to CEO, CIO, CDO and CISO

Expand indirect distribution with a rewarding channel partnership program

Maintain low customer churn with a customers-for-life approach

Make Google the easiest cloud provider for enterprises to do business with

Expand Total Addressable Market

New Products Introduced

- 280+ new products
- New Security category
- New Hybrid Cloud
- New Multi Cloud
- New industry solutions

New Compliance Requirements

- CJIS, FedRAMP High
- CCPA, FFIEC, HIPAA
- UK Cloud Sec. Principles
- NIST 800-34
- 45+ other requirements

New Enterprise Solutions

- SAP
- Oracle
- VMWare
- Windows
- Mainframe Migration
- Data Warehouse Modernization

Improved Product Maturity

- Leader 8 Gartner MQ
- Leader 12 Forrester Waves
- 20 total leader positions
- 6X increase in leader positions between 2017 and 2019
- Competitive with other hyperscalers

SOME IMPORTANT FACTS

3.5x increase in the number of Google Cloud certifications from 2018 to 2019

More than 750,000 new Google Cloud trained developers in 2019

Google Cloud Certified Architect is the highest paid IT certification in the industry*

*Global Knowledge, February 2020

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Customer Win Examples: Expand TAM

Expand Direct Go-to-Market Organization

Scaled Direct Sales Organization

- New global leadership
- Specialized by industry
- Specialized by market tier
- Solution-driven sales approach
- Value engineering approach

Scale Solution Delivery Capability

- Digital advisory expertise
- Pre-defined solution packages
- Built Customer Success Organization
- Accelerate customer adoption with Academy

Mission Critical Customer Service

- 15 minute response time
- Enterprise customer support offering
- Technical Account Managers
- Deep product specialization in services
- Global Support Centers

Enterprise Readiness

- Enterprise friendly contracting
- Enterprise licensing
- Subscription pricing
- Simplified billing
- Clearly defined partnering models & channel pricing

SOME IMPORTANT FACTS: 2019 vs. 2018
Significantly increased direct sales coverage and sales productivity in 2019
Number of deals over $50M more than doubled
Google Cloud is on track to more than triple direct sales coverage while increasing productivity per rep
Strong Backlog shows continued growth via both direct and indirect channels

Expand Indirect Distribution via Partners

Broaden Customer Reach

- Two Tier VADs
- Value Added Resellers
- Telecommunications Service Providers
- Hardware Partners

Drive Solution Adoption

- Regional System Integrators
- Global System Integrators
- Specialist Solution Providers
- Co-Design Partners

Speed Up Cloud Migrations

- Managed Service Providers
- REITS
- Outsourcing Specialists

Drive Growth in Key Industries

- Horizontal ISVs
- ISVs in key industries
- SaaS providers

SOME IMPORTANT FACTS: 2019 vs. 2018

190% YoY increase in partner influenced GCP Revenue

13X increase in new customers won by partners in 1H 2019 over 1H 2018

85% YoY increase in Google Cloud partner-sourced deals

300% YoY increase in the number of Google Cloud certified partners

Expand Channels: ISVs & Distribution Partners Examples

ISVs & SaaS

Technology Partners

VARs, VADs, MSPs

System Integrators

Industry Momentum

8 / Top 10
Telecommunications
companies

7 / Top 10
Media & Entertainment
companies

7 / Top 10
Retail & CPG
companies

8 / Top 10
Software & Internet
companies

5 / Top 10
Financial Services
companies

5 / Top 10
Professional Service
companies

5 / Top 10
Logistics & Transportation
companies

5 / Top 10
Automotive Manufacturing
companies

Every Country, Every Industry

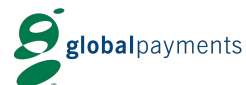|	Retail	Healthcare & Life Sciences	Financial Services	Media & Entertainment	Gaming	Energy & Manufacturing	Auto & Transportation	SaaS
AMER	TARGET URBAN OUTFITTERS ebay	Cleveland Clinic Lahey Health NIH National Institutes of Health	credit karma Bloomberg Scotiabank	nielsen USA TODAY WSL	BlueStacks HIGH5 GAMES MADFINGER GAMES.COM	SANMINA Celestica Chevron	mozio GEOTAB LATAM	Anaplan IRON MOUNTAIN Genesys globalpayments
EMEA	Carrefour METRO	allcyte: Casa Salute YouGenomics Moving science forward	LLOYDS BANKING GROUP ING AUKA	DIGITALDISTRICT™ tiso blackstar group. JARGON PR	King SILVER MULTIPLAY	TOTAL VEOLIA SIEMENS	FNM Heathrow chauffeur prive NetworkRail	nubbius Outbrain SYMPHONY
JAPAC	UNIQLO honestbee bigbasket	INNOPLEXUS™ maxwellmri mydoc	MPAO omise Heritage Bank	INFECTIOUS MEDIA redboat KKBOX	colopl RAY ARK ELEX	LG CNS RAMCO SUPERGRADE HER MIN	AirAsia GO-JEK iCarAsia	FUJITSU atomx Castbox

Some Retail Customer Examples

Some Financial Services Customer Examples
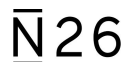
Some Communications & Media Customer Examples

Summary

- Strategy: Accelerate digital transformation with the best infrastructure, platform, and industry specific solutions

- Google Cloud's infrastructure, platform, and industry specific solutions are mature and highly differentiated

- Google Cloud's product maturity and broad partner ecosystem are expanding its Total Addressable Market

- Google Cloud is rapidly capturing large enterprise customers with the expansion of direct and indirect distribution channels

- Google Cloud offers enterprise support, customer success, and other services that drive strong customer retention

Thank you