



The New Big Players

Julien Landuré
@jlandure

Antoine Bonneau
@callmegoodwater



WHO ARE THEY?



BATX



@ Cafedelabourse



HISTORY



1987



2000

Tencent 腾讯

1998



2009



1999



2010



QUE FONT-ILS ?



ALEXA TRAFFIC

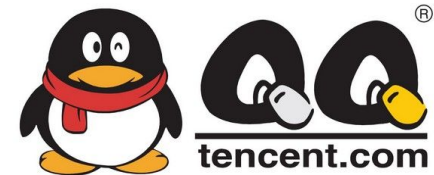
#1 

#2 

#3 

#4 

#5 
WIKIPEDIA

#6 

#7 

#8 

#9 

#10 



Active users per month



2,2 Mrd



1,0 Mrd



1,9 Mrd



0,8 Mrd



WhatsApp

1,5 Mrd



0,5 Mrd



1,3 Mrd



0,4 Mrd



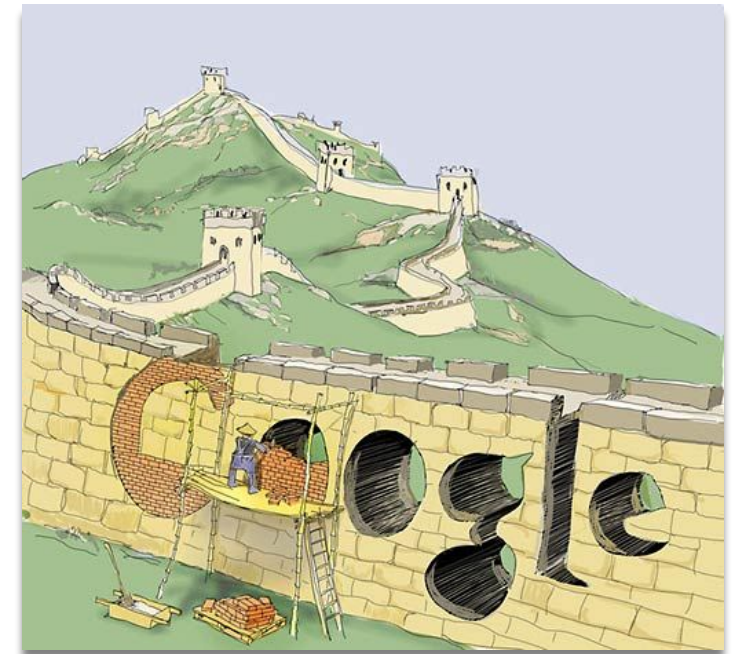
Chinese context



La Grande Muraille Électronique

L'État chinois garde la main sur l'ensemble du secteur médiatique par la gestion directe des médias officiels et le contrôle indirect des groupes privés.

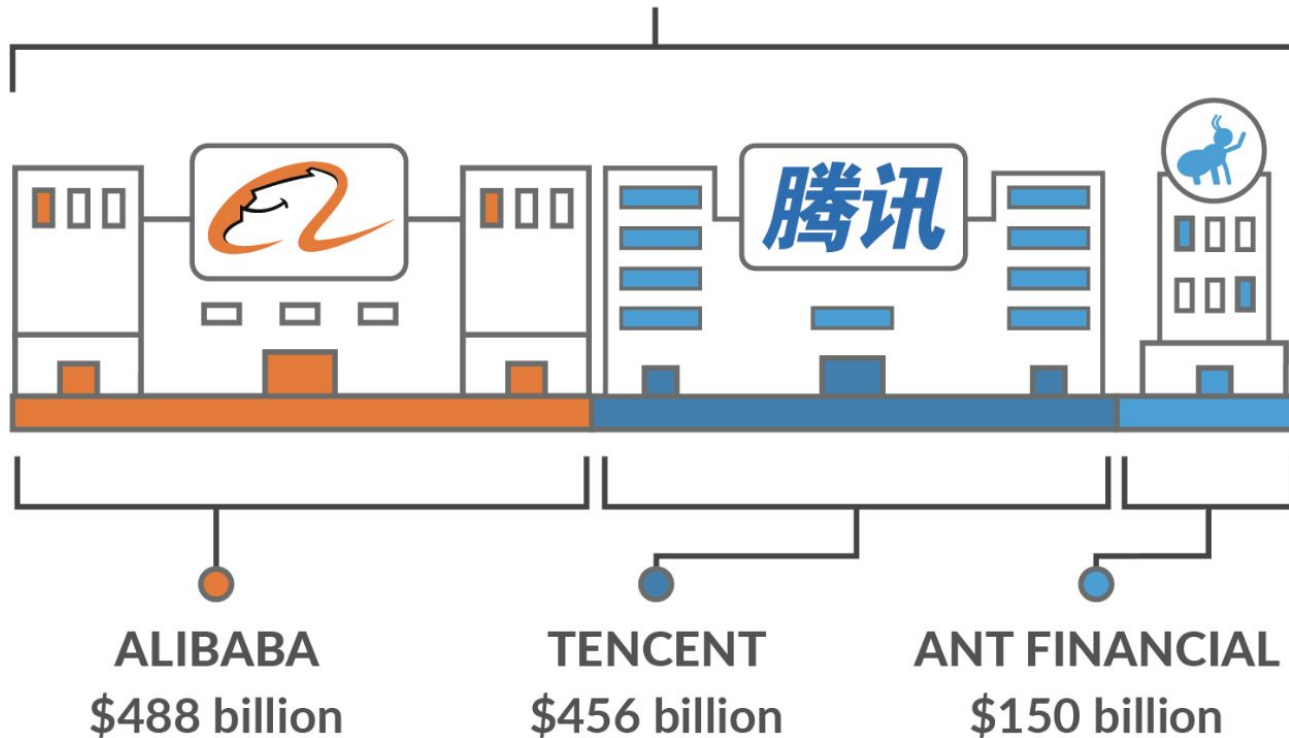
En 2018, 300 acteurs du web chinois créent une fédération pour soutenir les « valeurs centrales du socialisme » dont Tencent, Baidu et Alibaba.



Quelques chiffres...

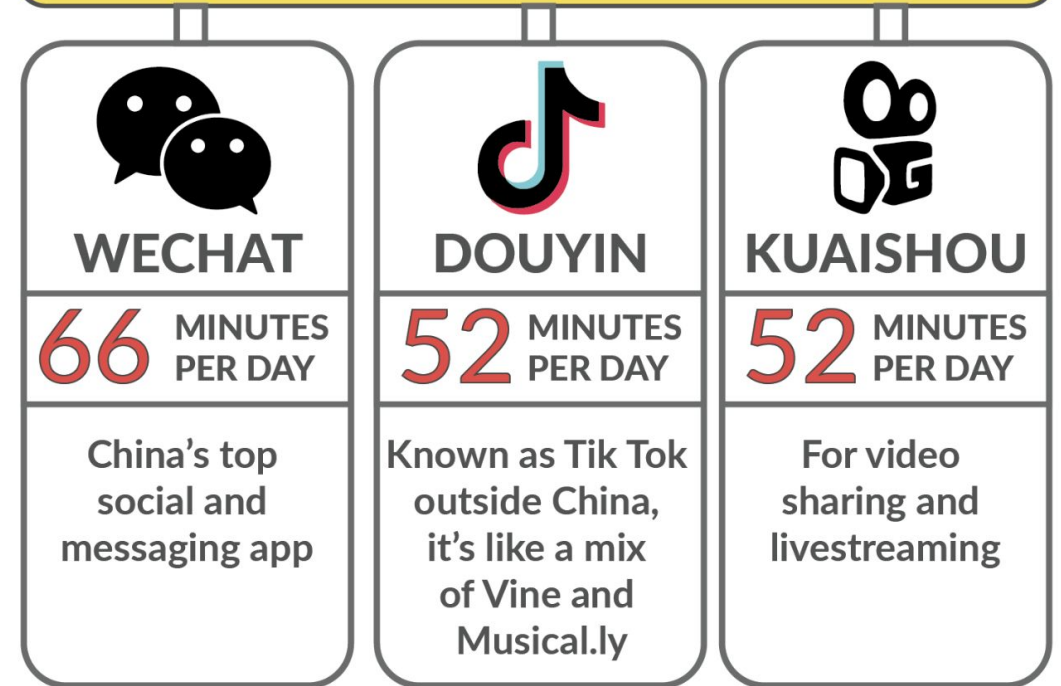
In this fast-growth landscape – where most foreign sites are blocked – China's top three web giants are worth

\$1.1 TRILLION



What are China's 772 million netizens doing?

47% of their time is spent on social media



DATA: Penguin Intelligence,
Mary Meeker's Internet Trends Report 2018

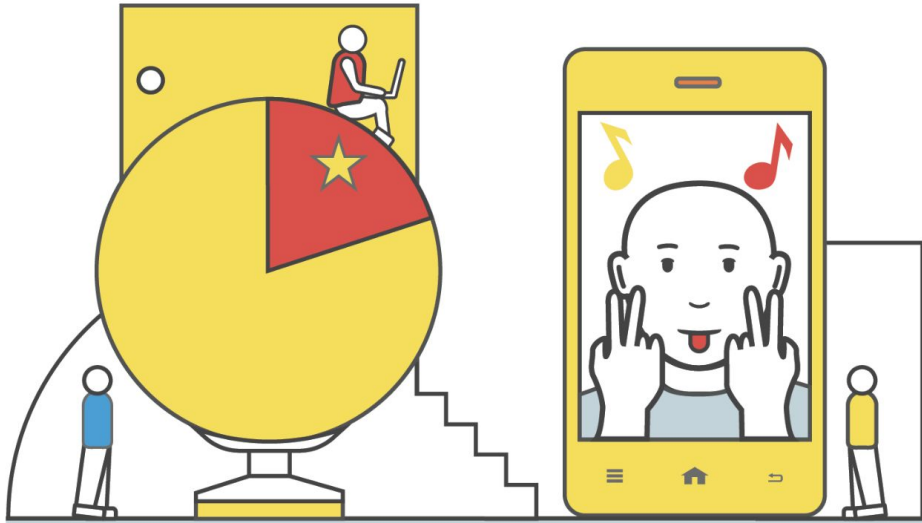
Quelques chiffres...

China accounts for
19% of the planet's
4 billion web users

DATA: Emarketer

...and 26% of
the 2.8 billion
smartphone owners

DATA: Forrester



People in China and the US are united in one way –
they spend 30 minutes more on the web
each day compared to the global average:

**6 HOURS,
30 MINUTES**

China also leads in terms of people using
their phones to pay in stores:

527 million

They mainly use
two apps for this



Alipay



WeChat

Mobile payments growth:

2015 \$1.5 trillion

2016 \$5 trillion

2017 \$15 trillion

2021 \$45.5 trillion

DATA: Analysis International, CLSA



BAIDU

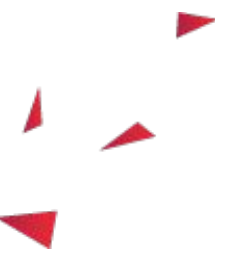
Créée en 2000

2 fondateurs

75% des recherches en Chine

6 milliards de requêtes par jour





Baidu Baike aka wikipedia
Ivyou Baidu (agence de voyage)
Baidu Maps
Baidu Wangpan (cloud)
iQyi (contenu video)





#1 - Complice de la censure

#2 - N'affiche pas ses concurrents

#3 - Mélange référencement payant et naturel

#4 - Publicité sur le nom de marque autorisée

#5 - Peu de pages indexées



Créée en 2017

R&D Team entre Chine et Silicon Valley

200 millions d'objets connectés à ce jour

2000 personnes travaillent sur l'entité AI de Baidu



Home Appliances		Smart Refrigerator (Android)	Smart Television	Smart Air Conditioner		
		Smart Washing Machine	Smart Water Heater	Smart Refrigerator LightOS		
Small Home Appliances		Soybean Milk Machine	Robotic Vacuum	Digital Media Players		
		TV Remote Control Device	Smart Speaker	Household Robot	Portable Speaker	
		Electric Rice Cooker	Storytelling Device	Sterilization Cabinet	Air Purifier	
		Activity Trackers				
Smart Home		Food Safety Monitoring Equipment	Water Purifier	AC Power Plugs and Sockets		
		Door Locks	Lamp	Curtain	Electric Fan	Kettle and Cups
		Temperature-controlled Equipment		Health Monitoring System		
Personal Device		Smartphone	Smart Watch	Smart Bracelet		
Automobile Unit		Vehicle-mounted Ancillary Equipment		Integrated Motor System	Smart Rearview Mirror	



Smart Automobile Unit Solution







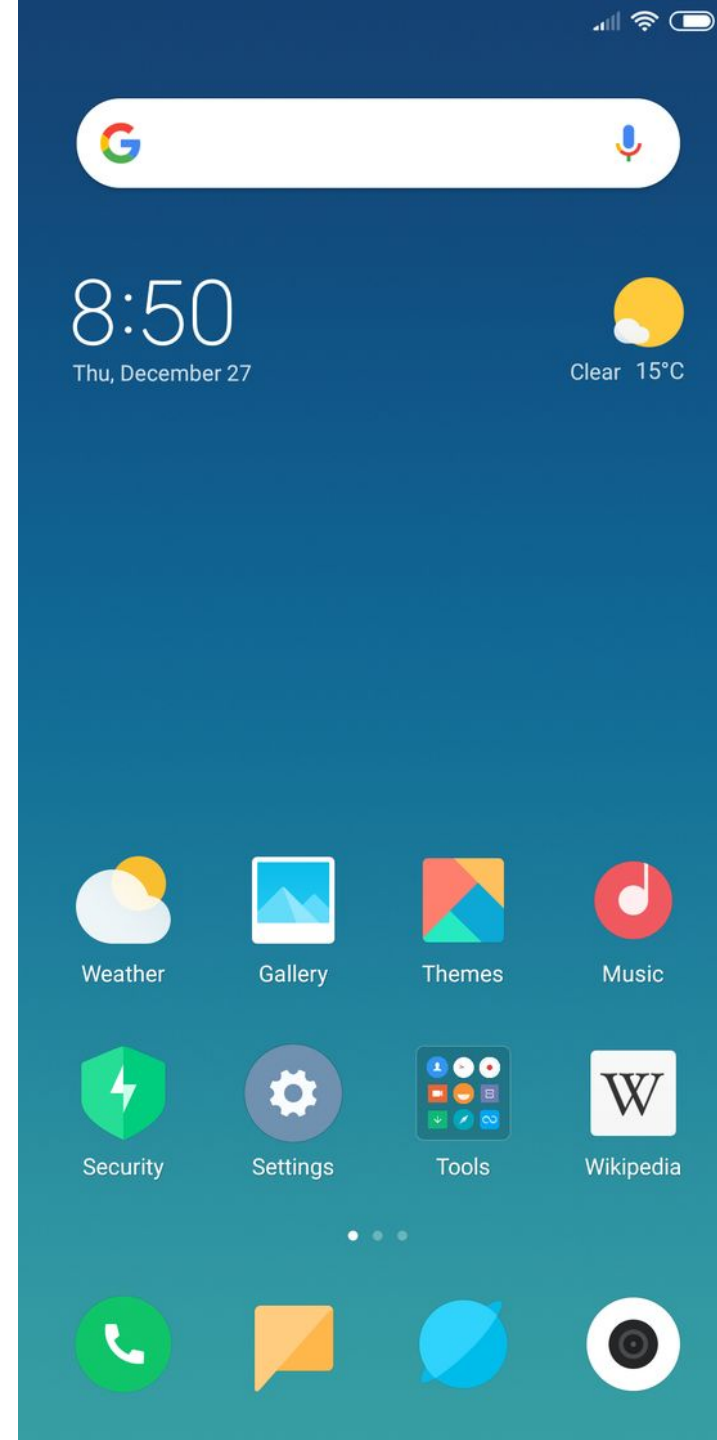
XIAOMI

Créée en 2010

8 fondateurs

Participation de Tata Group en 2015 (Inde)

4ème en part de marché mondiale en 2018





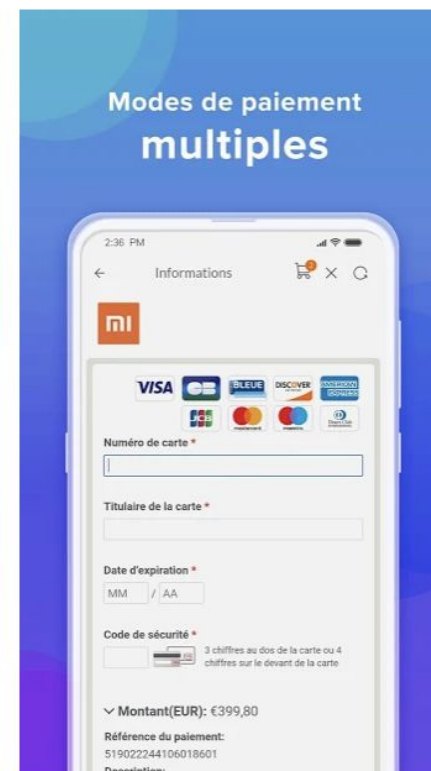
Mi Store

Xiaomi Shopping

 Tout public

★★★★★ 323 196 

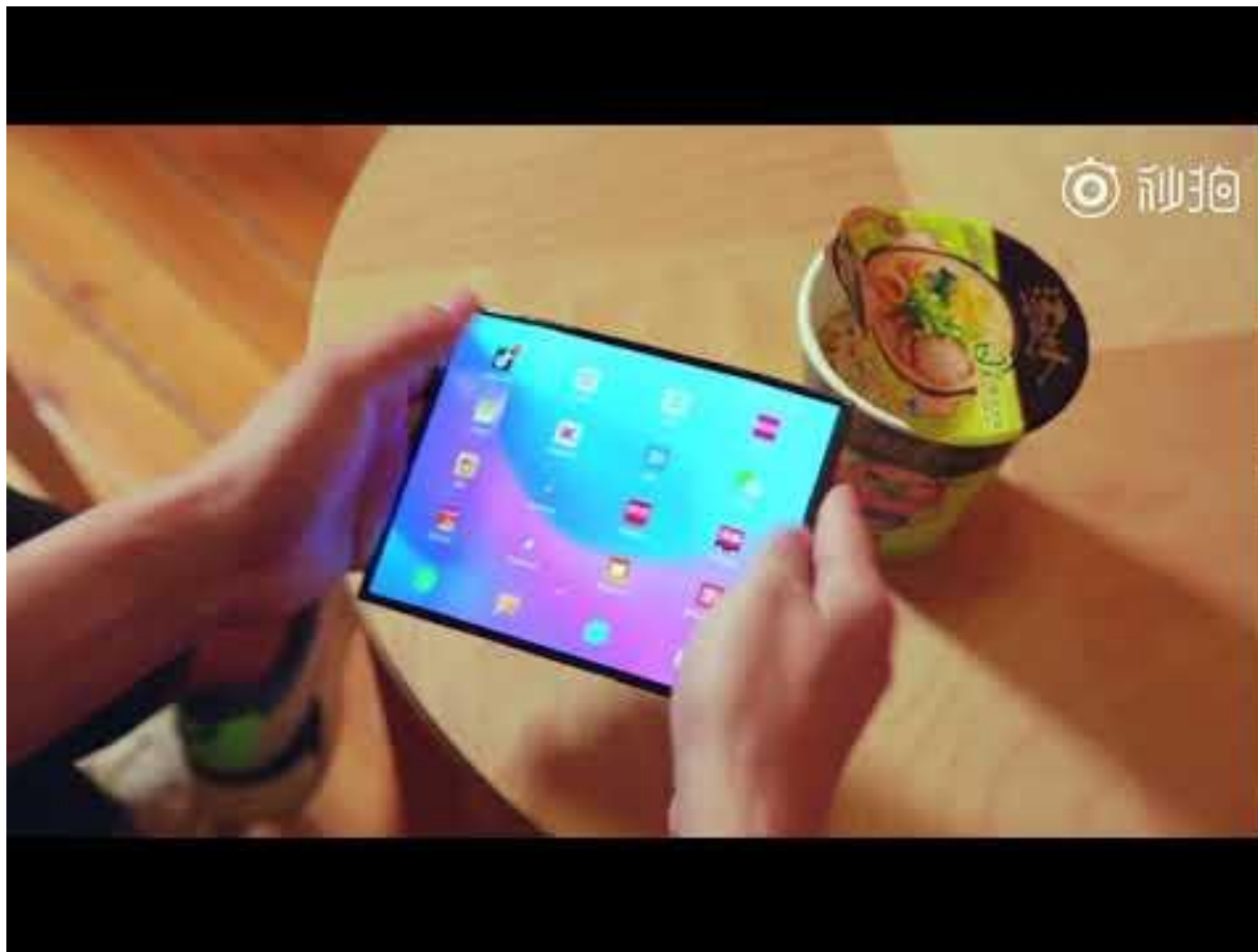
 Ajouter à la liste de souhaits



ALL INFRA CONTROL



ALL INFRA CONTROL



27 Mars 2019



TENCENT

Créée en 1998

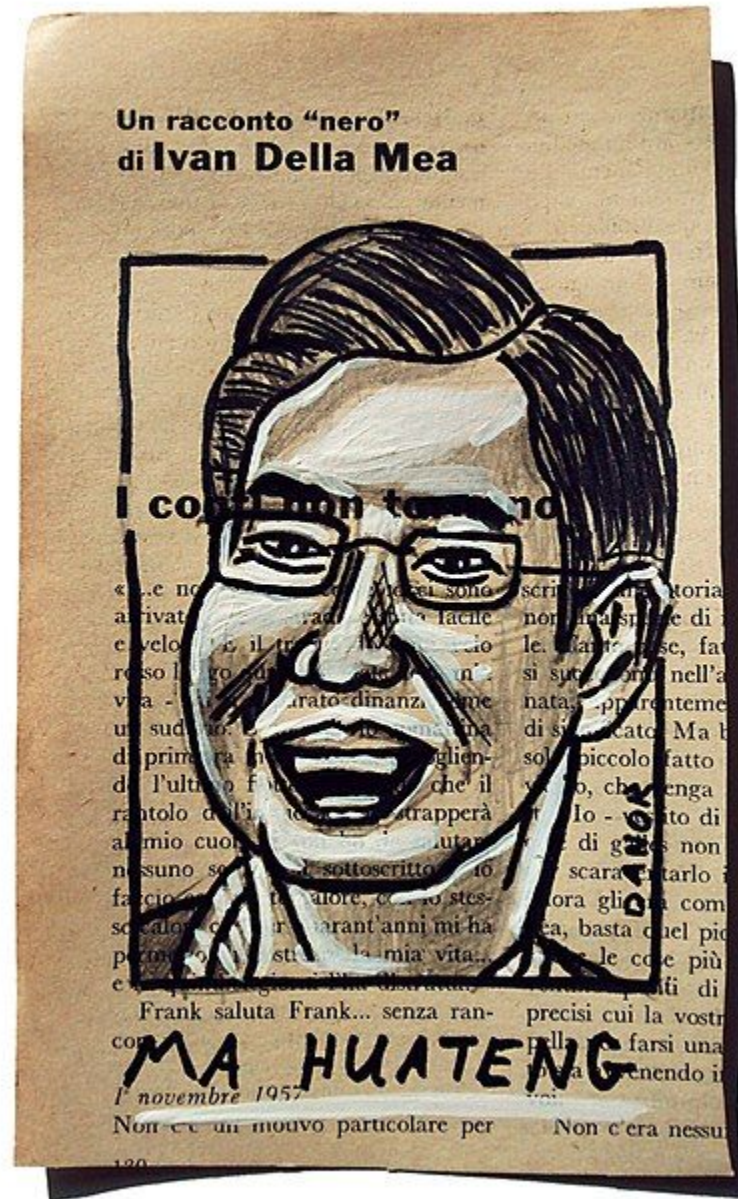
5 fondateurs

Fondée sur une messagerie instantanée

La plus grosse entreprise de jeux vidéos

“Pony Ma”, plus riche de Chine

Tencent 腾讯



TENCENT

Investissement dans Snapchat, Spotify,
Reddit, Tesla

Rachat avorté de WhatsApp en 2014

Tencent 腾讯



Online Games Platform

- #1 on PC and smart phone in China
- #1 online games company globally by revenue



Weixin & WeChat

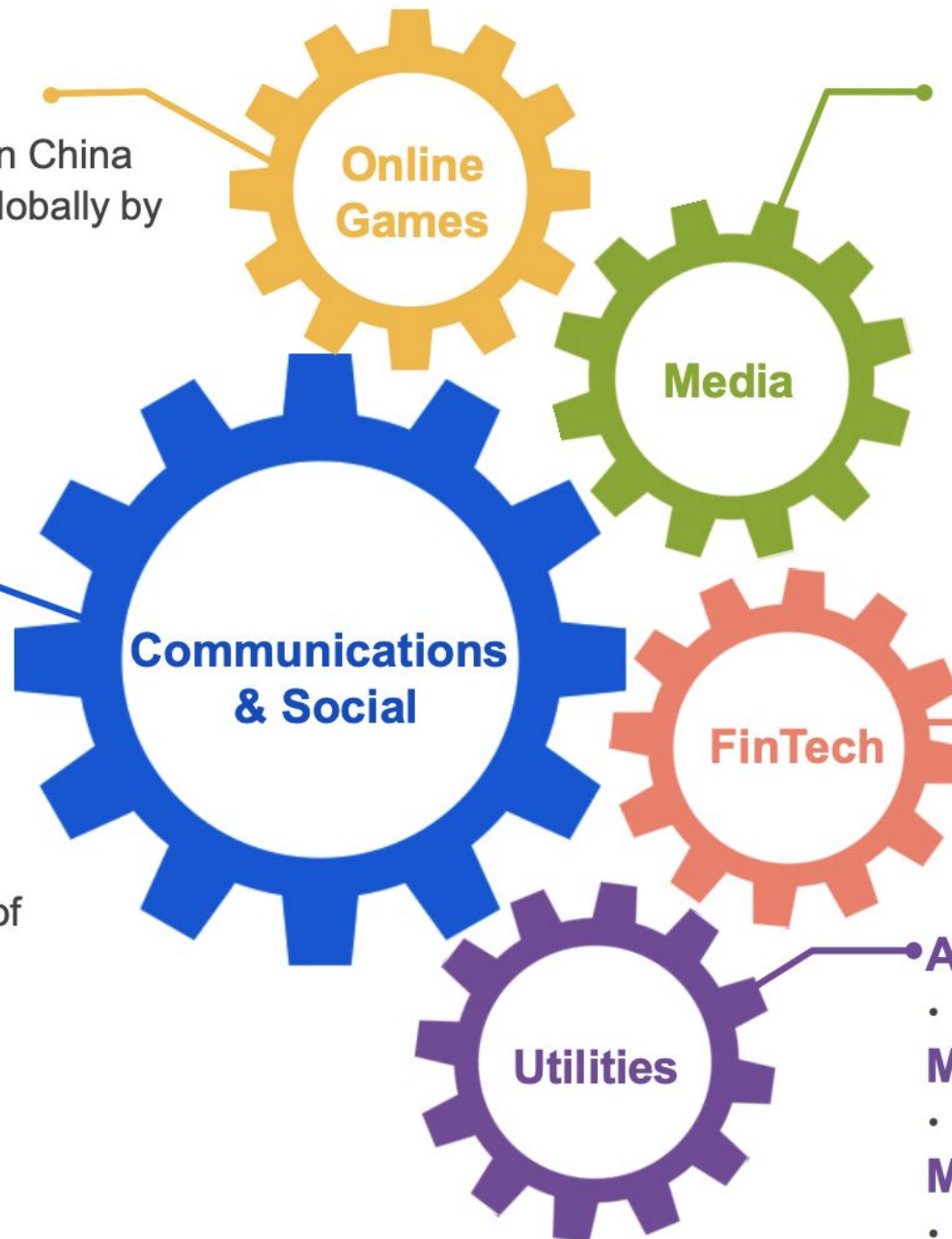
- #1 smart phone community
- MAU at 1,082m

QQ & Qzone

- QQ smart devices MAU of 698m ⁽¹⁾
- Qzone smart devices MAU of 531m



Tencent 腾讯



Online Games

Media

Communications & Social

FinTech

Utilities

Video

- #1 by mobile DAU and subscriptions

News

- #1 portfolio of news services by MAU

Music

- #1 music services platform

Literature

- #1 online content library and publishing platform

Mobile Payment

- #1 by MAU and DAU



WeChat Pay

App Store

- #1 by MAU

Mobile Security

- #1 by MAU

Mobile Browser

- #1 by MAU

Category Leaders



eCommerce & Smart Retail



Food Delivery & Local Services



Media & Social



Transportation



Health Consultation

Strategic Relationship with Content Providers

Video



Games



Music



Tencent 腾讯

Initiatives to Foster Healthy Game Play

Healthy Gameplay System

- Identify players aged 12 and below via real-ID verification and face recognition technology
- Impose maximum 1-hour game time daily
- Log-in ban between 9pm to 8am
- Launched in *Honour of Kings* in Sep, extending to 9 more games by year-end; aim to implement in all games

Other initiatives

- *Parental Guidance Platform* enables parents to engage with their children and track in-game activities
- Functional games serve as a tool to assist learning, improve dexterity among senior citizens, etc.

Impact

- Some children significantly reduced game time with *Healthy Gameplay System*
- Earned recognition from parents, over 10 million users signed up on *Parental Guidance Platform*

Tencent 腾讯 on for more healthy and sustainable growth over long term



QQ Menu

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Ma navigation Glisser l'ordre de réglage

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ALIBABA

Créée en 1999

18 fondateurs

$\frac{3}{4}$ des ventes en lignes passent par ses plateformes

90% du business en Chine

6% des revenus sur Alibaba Cloud





ALIBABA IS NOT AMAZON



“My dream is that our technologies can make every companies become Amazon” -- Jack Ma

AMAZON veut tout controler (entrepots, produits, camion, avion, datacenter etc.)

ALIBABA veut mettre en relation les vendeurs et les acheteurs.
Elle ne possède rien

“Alibaba is giving power to the people, Amazon is taking power from the people”



ALIBABA BRANDS



Taobao.com

Tmall

AliExpress™



YOUKU



ALIBABA



“pouvoir livrer partout en Chine sous 24 heures”

- #1 - Clients
- #2 - Employés
- #3 - Actionnaires



“Crazy Jack”

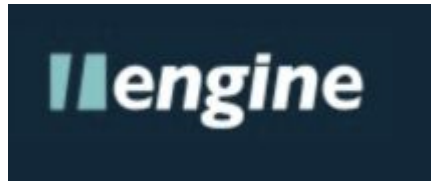


ALIBABA : Flyzoo Hotel

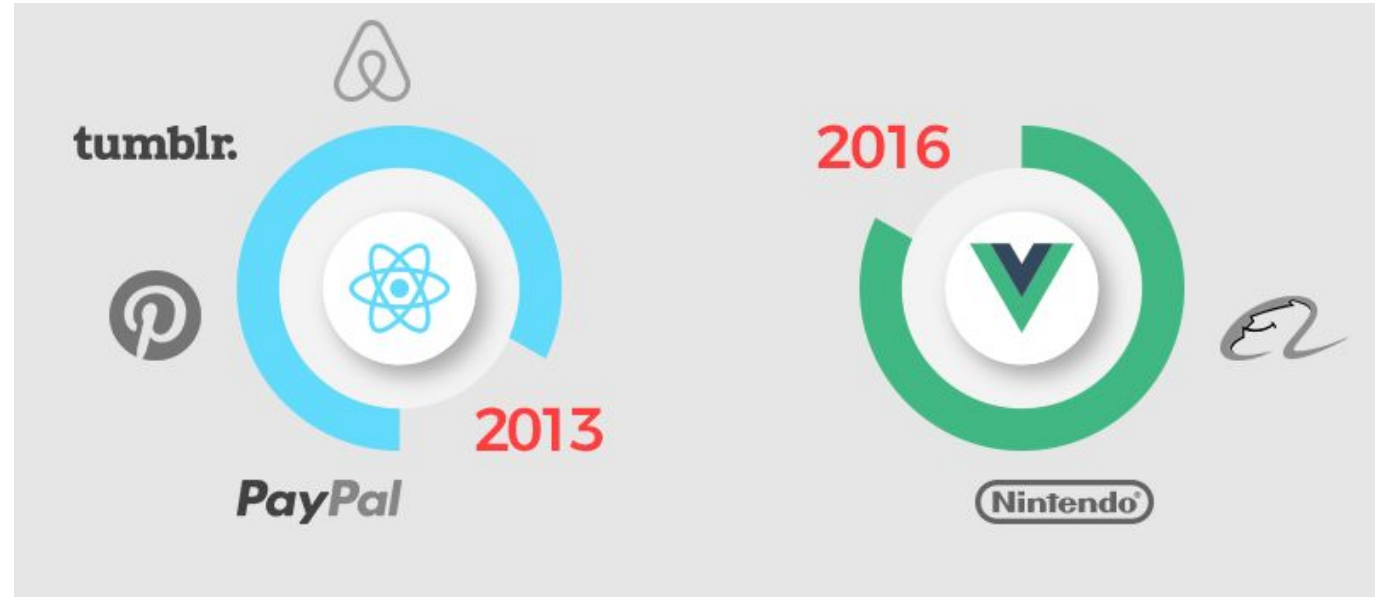


STACK

« Talk is cheap, show the code » — Linus Torvalds



AliOS



Vue has a much more international roster, including “the big three” of Chinese tech industries - Alibaba, Baidu & Tencent, and some of the highest-valued unicorns, e.g. Xiaomi, Didi, Chuxing, Ele.me & DJI





CLOUD ONLY

Why Alibaba Cloud

As the Official Cloud Services Partner to the Olympic Games and the infrastructure powering Alibaba, we provide high-performance cloud technology to help your business perform at its best.



Cloud Without Borders

Cut down latency and deploy globally on Alibaba Cloud's international network of 19 data center regions and 56 availability zones, including access to China under one single global account.



Safeguard Your Data

Alibaba Cloud is committed to the highest levels of compliance including Germany's C5 standard, PCI DSS for payments, HIPAA for healthcare, and the EU GDPR for data protection and privacy. [Learn More](#)



Record-breaking Performance

Alibaba Cloud has broken competition records at Sort Benchmark in data sorting, and set new records in mitigating DDoS attacks and the processing volume of e-commerce transactions.

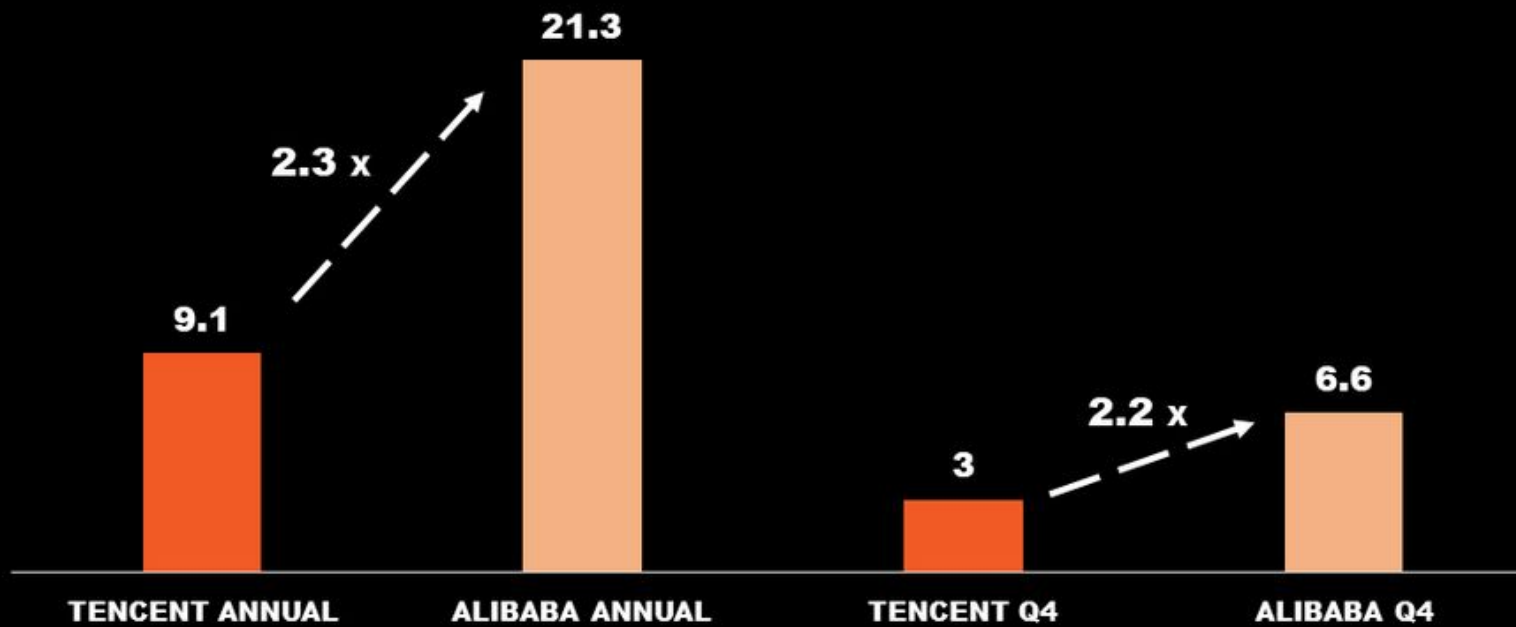


China's Largest Cloud Provider

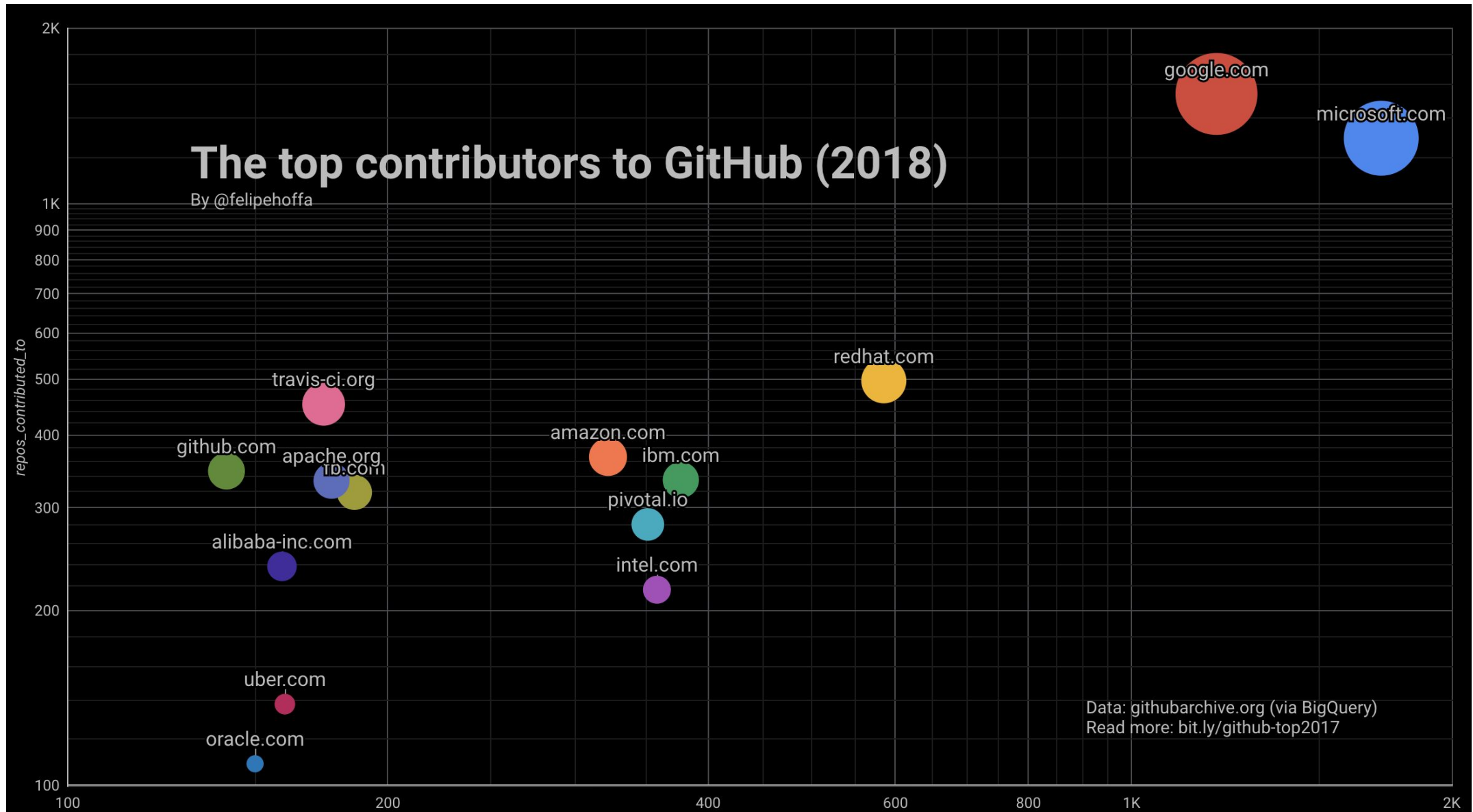
Access China's most advanced cloud network, including 1300+ CDN nodes and 7 deployment regions, as well as dedicated ICP application and compliance support. [See China Gateway](#) [Link](#)

CLOUD ONLY

TENCENT VS. ALIBABA CLOUD REVENUES 2018, BILLION RMB



CONTRIBUTION



[Link](#)



TECH INNOVATION

Gros focus sur IA
Realite Virtuelle
Telecommunication



aliNPU



LABS



14 LABOS

300 chercheurs

8 villes dans le
monde



DAMO

ALIBABA DAMO ACADEMY



Machine Intelligence

Speech Lab

Vision Lab

Language Technology Lab

Decision Intelligence Lab

City Brain Lab

Data Computing

Computing Technology Lab

Data Analytics and Intelligence Lab

Database and Storage Lab

Robotics

Intelligent Transportation Lab

Financial Technology

Financial Intelligence Lab

Blockchain Lab

Biometrics Lab

X Laboratory

Quantum Lab

AI Labs



Silicon Valley AI Lab

Baidu Research - research.baidu.com

Reconnaissance vocale en open source
Cancer metastasis detection





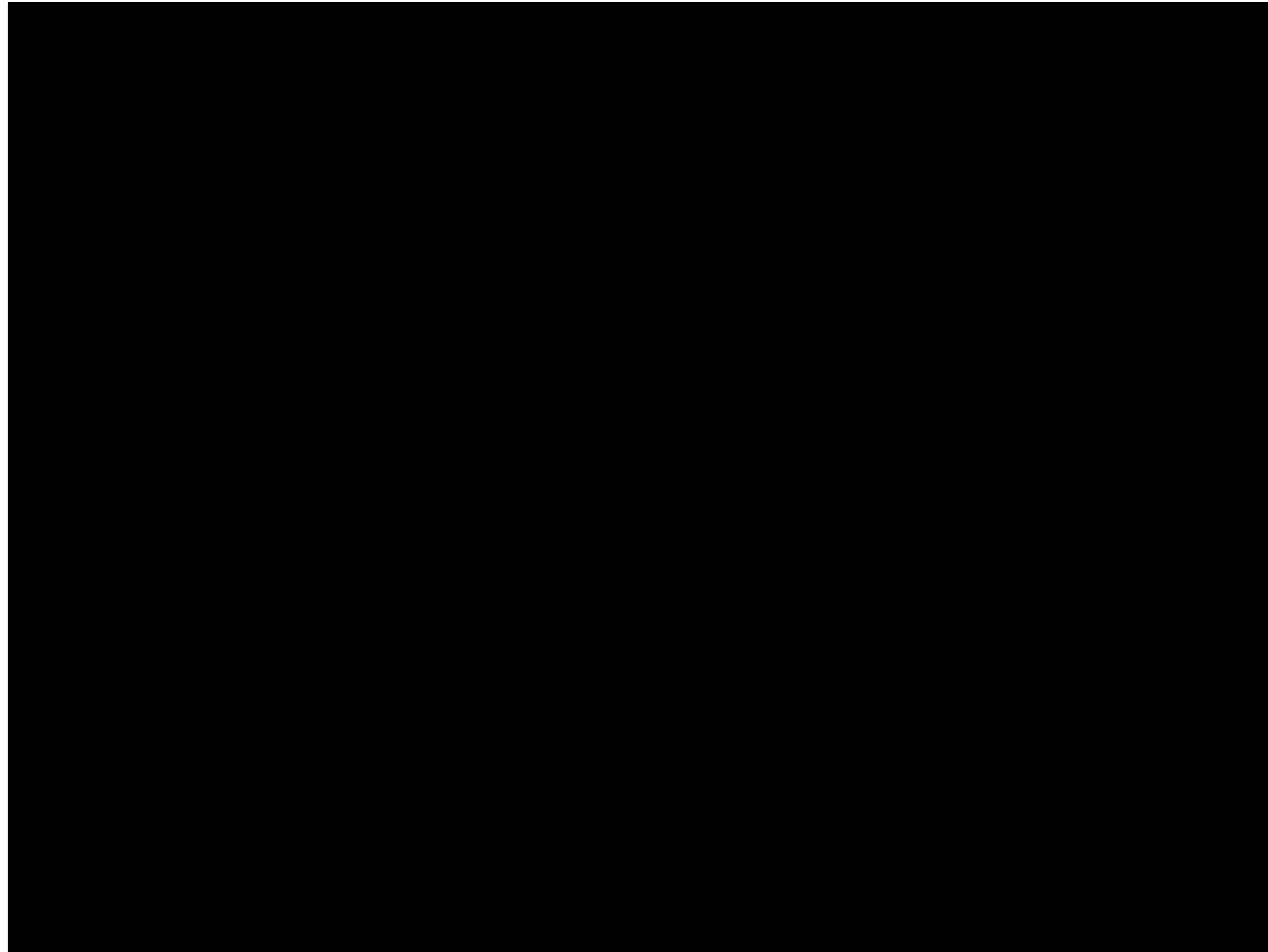
Matthew Brennan

@mbrennanchina

Suivre



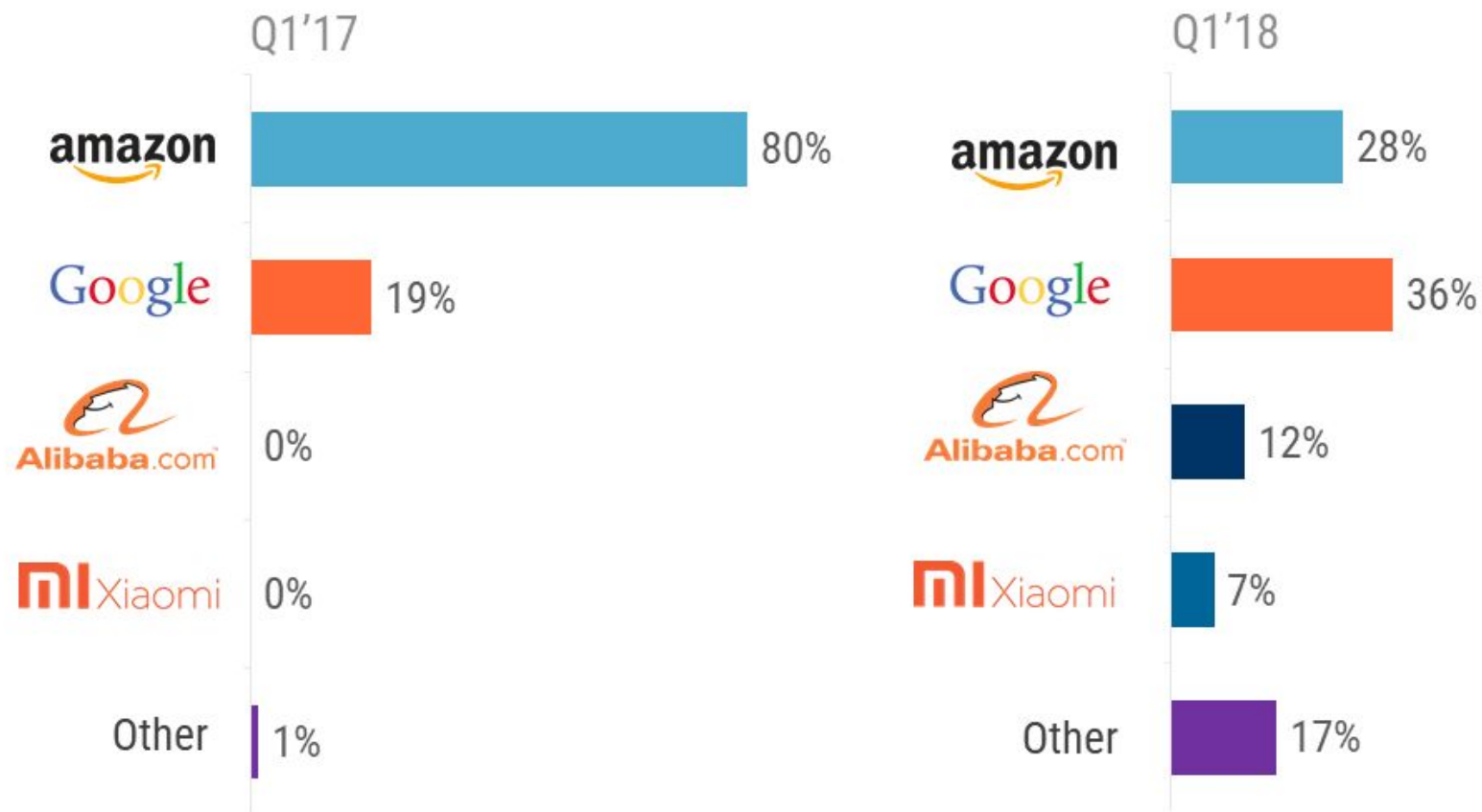
Wow! China Airport face recognition systems to help you check your flight status and find the way to your gate. Note I did not input anything, it accurately identified my full flight information from my face!





China's growing presence in smart speaker market

% of total global shipments by major players



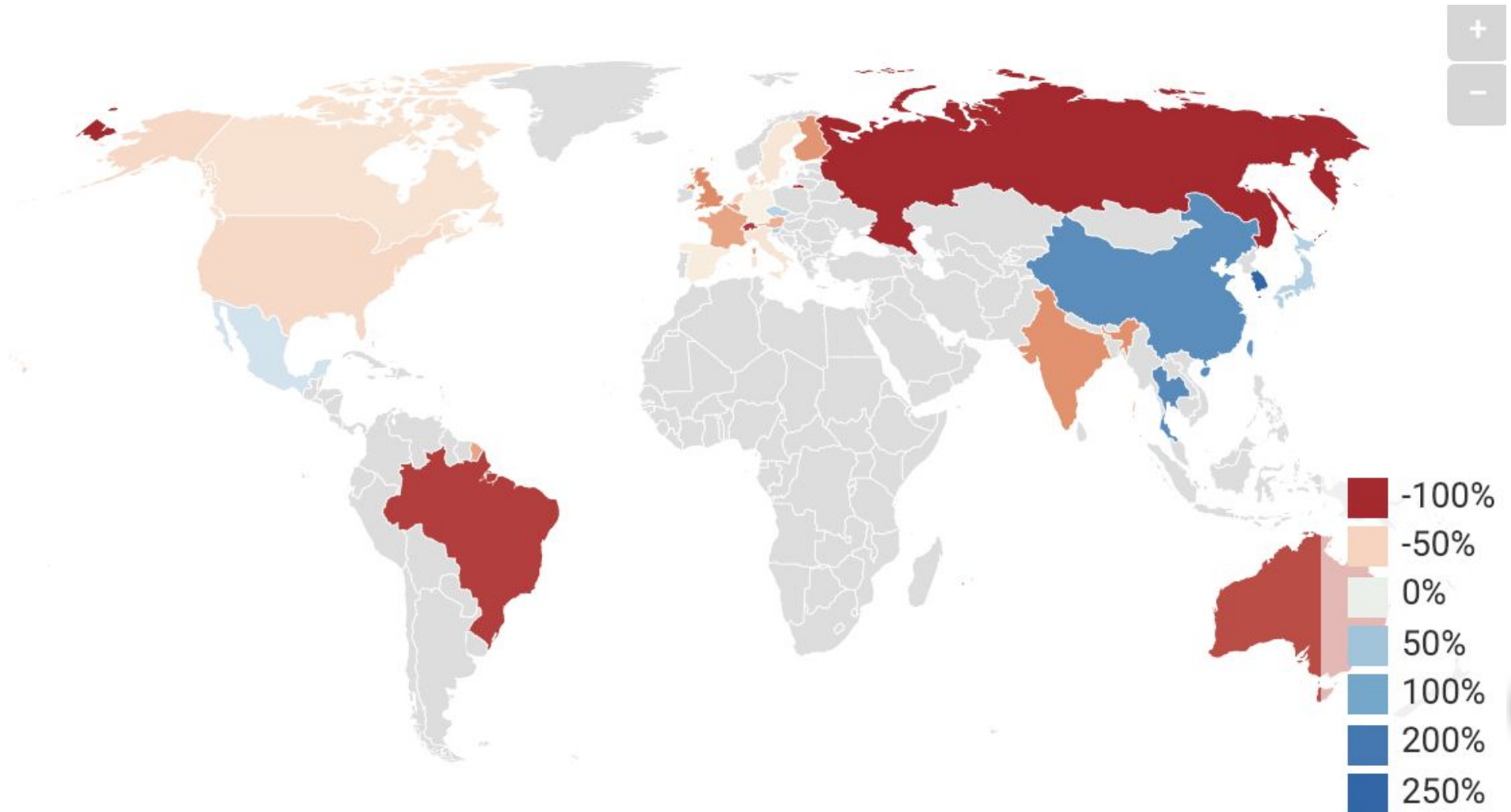
Source: Canalys estimates, Smart Speaker Analysis, May 2018

CBINSIGHTS



Robot

The robot costs US\$25,000 and could replace up to four workers who earn US\$24,000 a year —Equal times



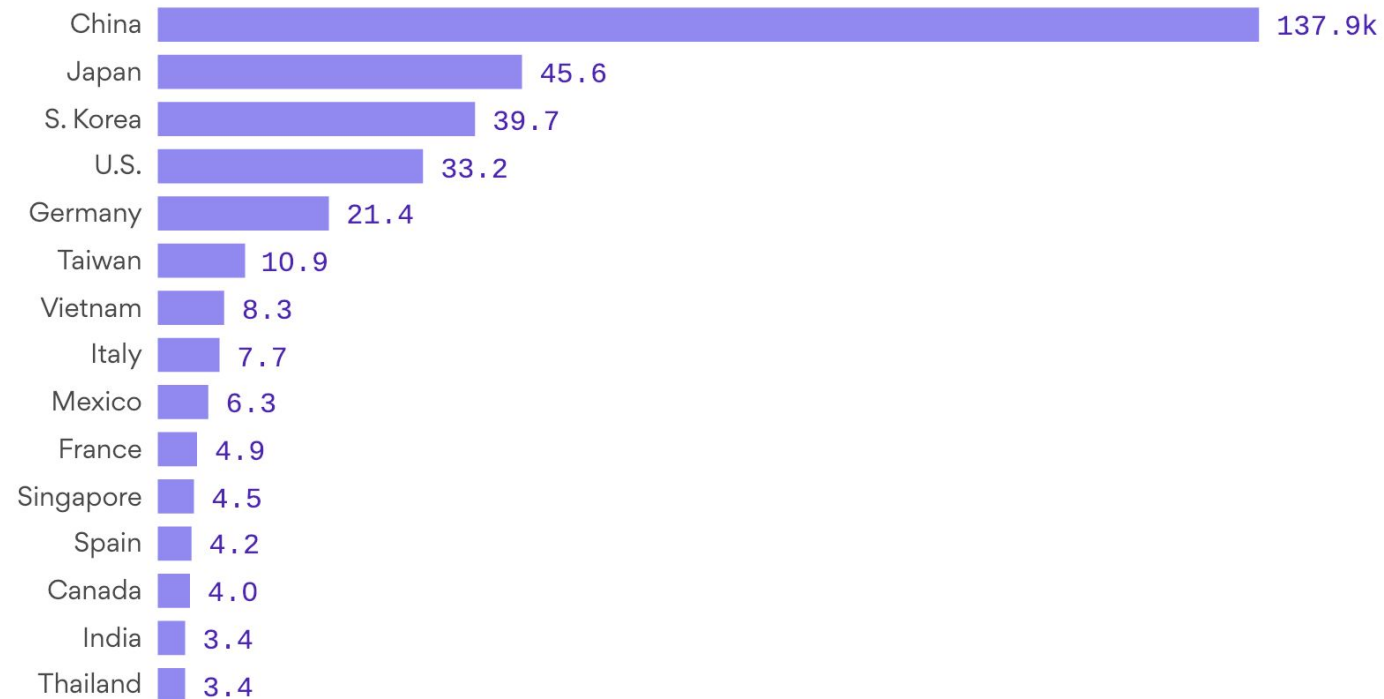
Robot

"If you are an industrial robotics supplier, China is a short-term sales opportunity, but a long-term competitive threat."

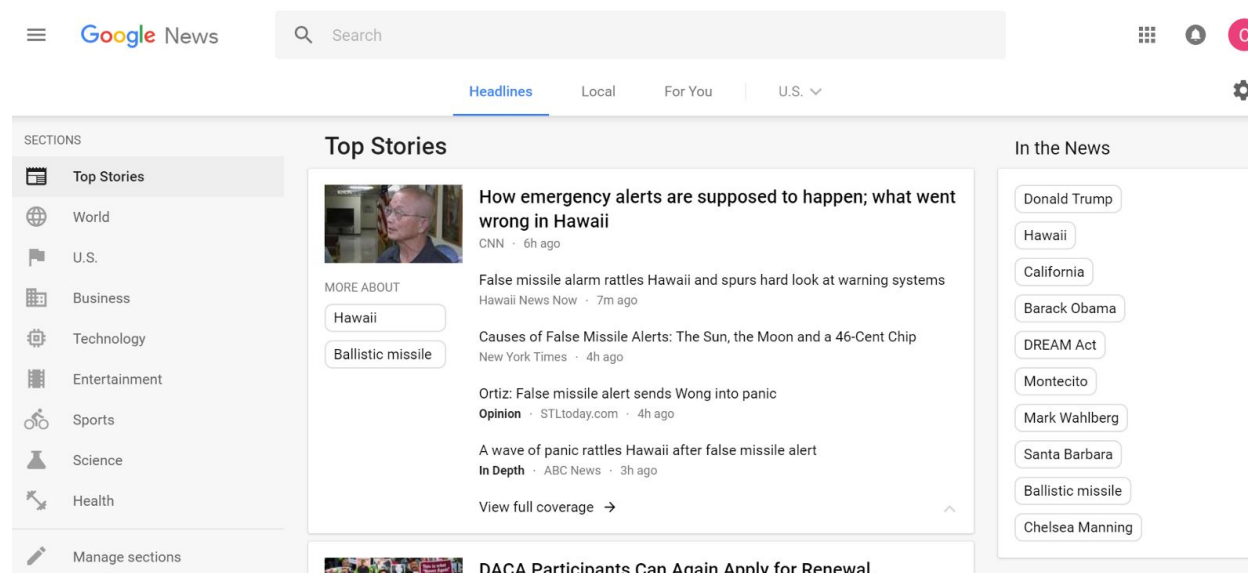
—Gregory C. Allen, Center for a New American Security

China's robot uprising

Estimated number of industrial robots purchased in 2017



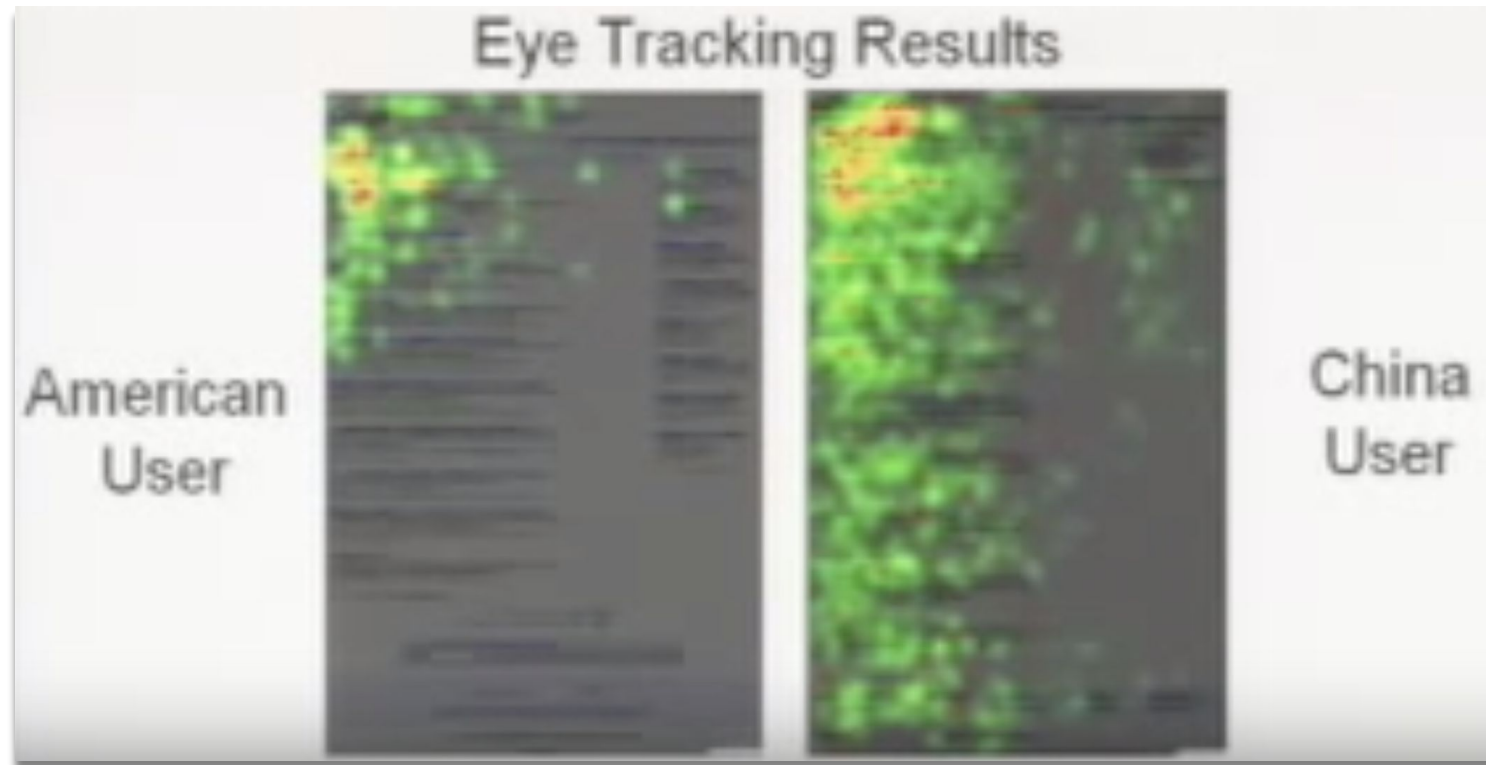
UX

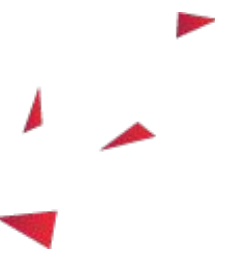


QQ vs Google News



UX





UX

“Why do the Chinese prefer a more complicated UI/UX?”

邇

Caractère plus complexe



LEADERS

Self Marketing
Story Telling
They know the product
Vision



“Crazy Jack”



"CROCODILE IN THE VANOTZ"
TALUSWOOD FILMS

Bloomberg

I've always said our competitors
are not domestic websites,

LEADERS



Pony Ma (Tencent), Jack Ma (Alibaba), Robin Li (Baidu)



CULTURE IMPACT



CAMPUS



Alibaba



Baidu



RECRUITMENT

I'd rather interview 50 people and not hire anyone than hire the wrong person — Jeff Bezos, Amazon

Obtenir un entretien



Recommandation	43%
Recrutement à l'université	21%
Candidature en ligne	21%
Recruteur	7%
En personne	7%



Obtenir un entretien



Candidature en ligne	57%
Recommandation	15%
Recrutement à l'université	13%
En personne	8%

Obtenir un entretien



Obtenir un entretien



Tencent 腾讯

FEEDBACK

glassdoor



Highly culture driven organization. Life balance impossible



Everything, Free food, Free cab, Benefits ,Gifts
Great place and good environment. Superb infrastructure. Can play games anytime.
Work life balance.

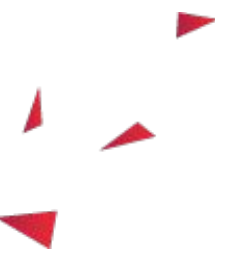


working in Tencent is a good experience... life balance difficult



Great Job and Great Colleagues. Work too intensive ...





LIFE BALANCE

“e-commerce is the way of life in China”

996

Hard workers

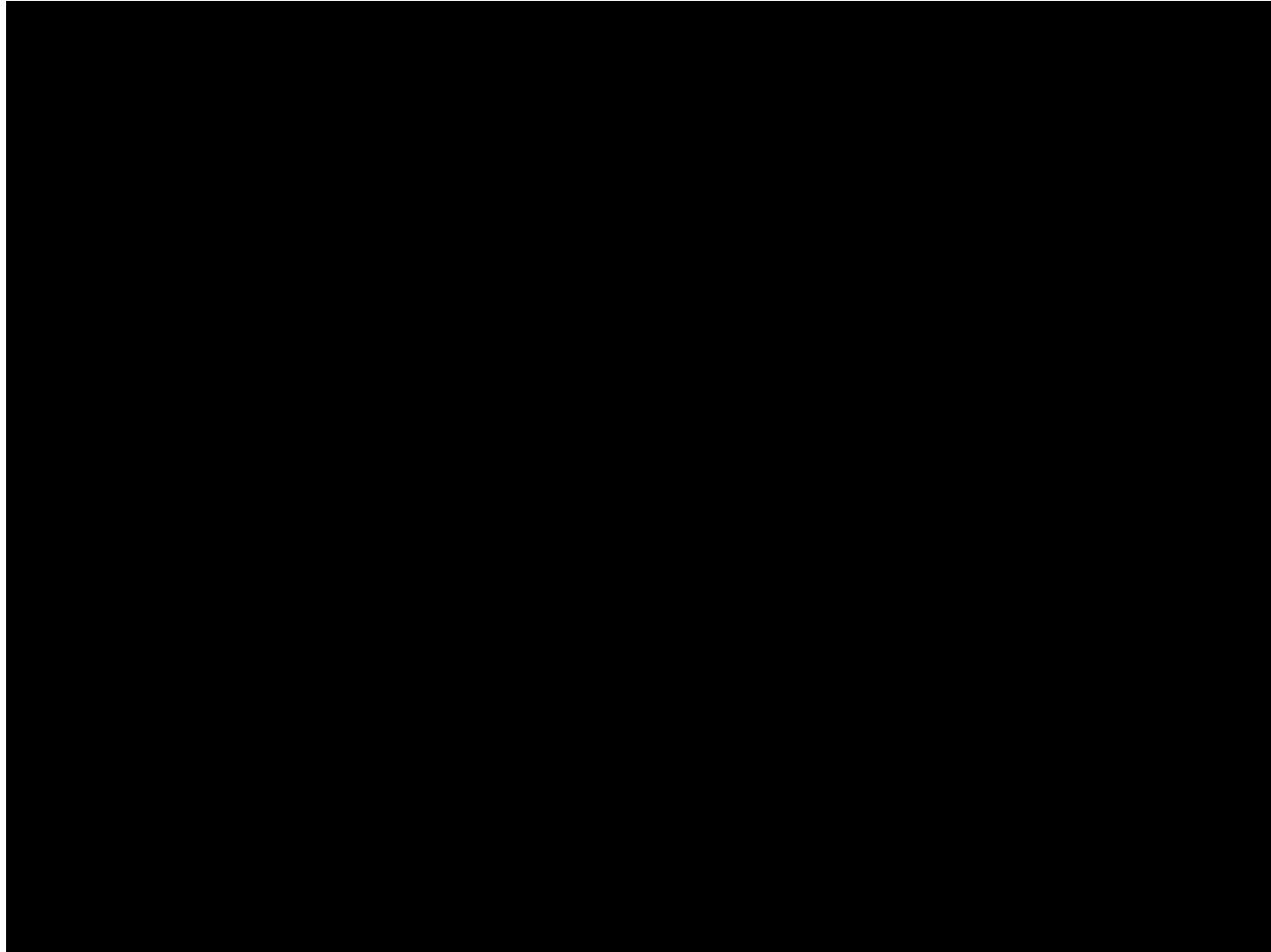
Competitors

Never give up



LIFE STYLE

Chongqing, China



Versus USA

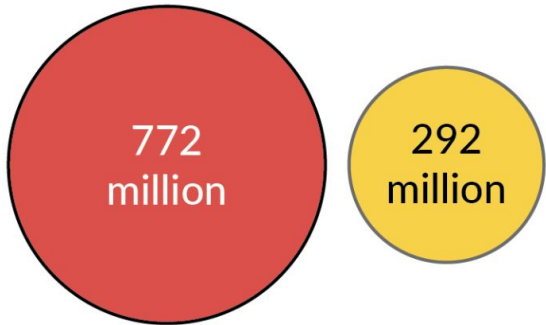


THIS IS THE SCALE OF CHINA'S INTERNET NOW

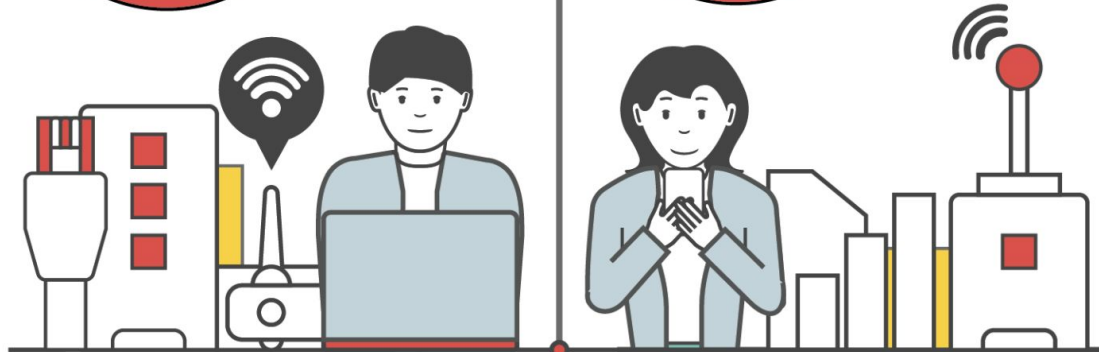
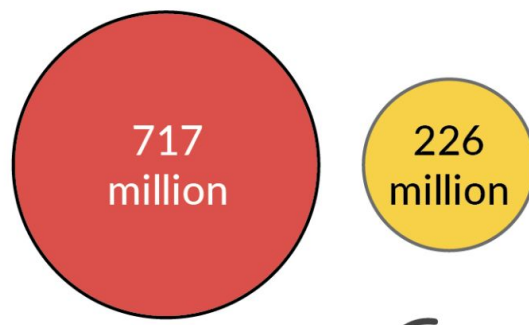
● CHINA

● US

INTERNET USERS

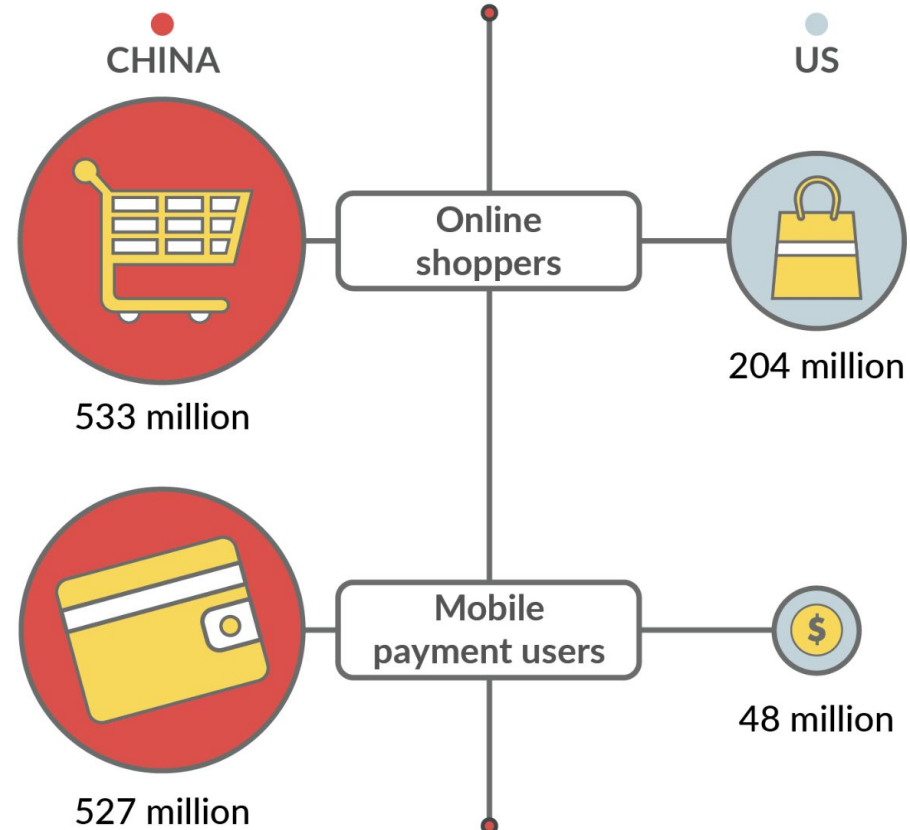


SMARTPHONE USERS



SHOP 'TIL YOU DROP

China leads the world in ecommerce, with online shopping accounting for just over 20% of all retail sales



DATA: CNNIC, Emarketer, Statista



Versus GAFAM

Schéma 1

Le match BATX vs. GAFAM

Le match BATX vs. GAFAM : capitalisation en Md de dollars (2018)



Le match BATX vs. GAFAM : chiffre d'affaires 2017 en Md de dollars



US TECH GIANTS



791.7 billion USD



664.5 billion USD



459.4 billion USD



399.9 billion USD

EUROPEAN TECH COMPANIES



29.9 billion USD



12.73 billion USD



119.7 billion USD

ASIA TECH GIANTS



254.3 billion USD



59.9 billion USD



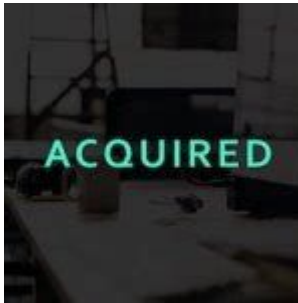
436.8 billion USD



405 billion USD



LEARN MORE





The New Big Players

Julien Landuré
@jlandure

Antoine Bonneau
@callmegoodwater

US leading digital companies

Amazon
USD107.01Bn



eBay
USD85.92Bn



Overstock
USD1.66Bn



Facebook
USD17.9Bn



Google
USD74.54Bn



LinkedIn
USD2.99Bn



Yahoo
USD4.97Bn



Trip Advisor
USD1.49Bn



Expedia
USD6.7Bn



Uber
USD10Bn*



China leading digital companies

Alibaba
USD394Bn



JD.com
USD64.6Bn



Dangdang
USD1.48Bn



Tencent
USD15.82Bn



Baidu
USD10.51Bn



Soufun
USD883.51Mn



Qunar
USD643.9Mn



Ctrip
USD1.82Bn

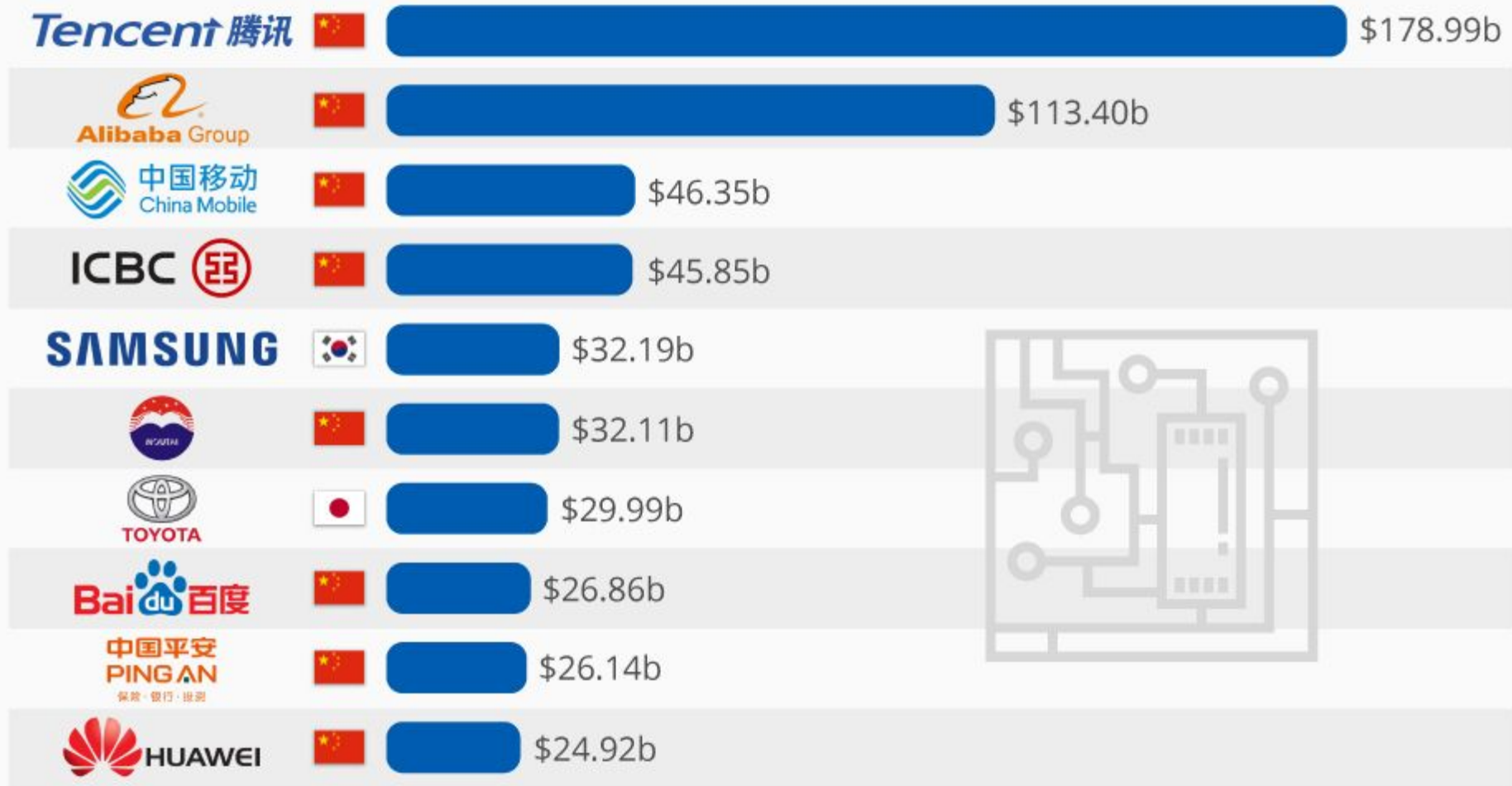


Didi Kuaidi
USD12Bn*



Chinese tech giants lead Asia's top 10 brands

Top 10 most valuable corporate brands in Asia as of May 2018*





Core Business

Search, advertising

Gaming,
communication

E-commerce

Using big Data for

Better search, financial
product distribution

Banking, taxis, movie
tickets

Credit scoring

And then selling

Mutual funds based on
search information

Cross-product financial
product distribution

Lending products based
on shopping history

WEIBO

首页

我的收藏

我的赞

热门微博

热门视频

好友圈

特别关注

时事

媒体

新闻

互联网

政府

展开

有什么新鲜事想告诉大家?

好乱! 狗仔曝马蓉宋喆分割财产实为双方父母闹离婚(视频) 热门微博

表情

图片

视频

话题

头条文章

...

公开

发布

全部

原创

图片

视频

音乐

文章

搜索我关注人的微博

热门

国民老岳父公 推荐 #搞笑红人周# 没想到你是这样的酒鬼 秒拍视频

1299万次播放

02:56

收藏

42254

31623

73468

新浪广告



WEIBO

Site microblogging 2009

Alibaba Le géant du ecommerce détient en effet 31.4% des parts de **Weibo**

Edité par sina.com, site actualité pour les chinois expatriés

Weibo est une sorte de mix entre Facebook, Twitter et Instagram (où il est facile d’obtenir des likes) une version hybride de nos social media. Streaming, shopping, poker, gaming, marketing, c’est ce que propose Weibo.

Qualifié de “Twitter chinois”

« *le réseau social des stars* » : **Xie Na**(présentatrice télé, actrice et chanteuse) a plus de 90 millions de *followers* et **He Jiong** (présentateur télé, acteur et... chanteur !) dépasse les 83 millions.

