Investment on network infrastructure in APAC. Economic impact

Google Cloud

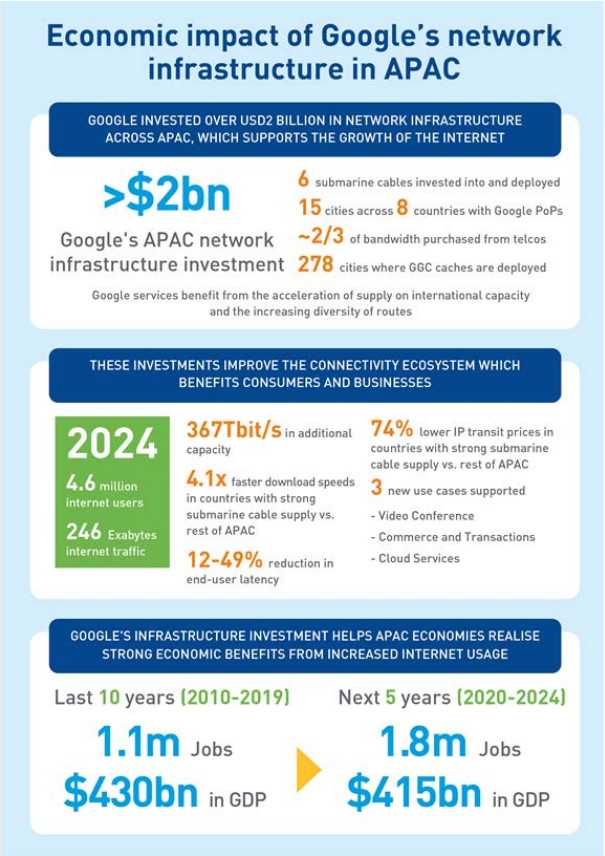
Google's investment in network infrastructure in APAC

- Within APAC, Google is an investor in 6 already deployed subsea cable systems and also purchases two-thirds of its international bandwidth in the region from APAC carriers

- Across a number of countries in the region, Google has deployed:
  - PoP in 15 cities and across 8 economies
  - Google Global Cache nodes across 278 cities

  and leases capacity on domestic fibre networks between these POPs, data centres and cable landing stations

- These connectivity improvements have a remarkable economic impact, both in the telecoms sector and as a 'spill-over' in other sectors of the economy



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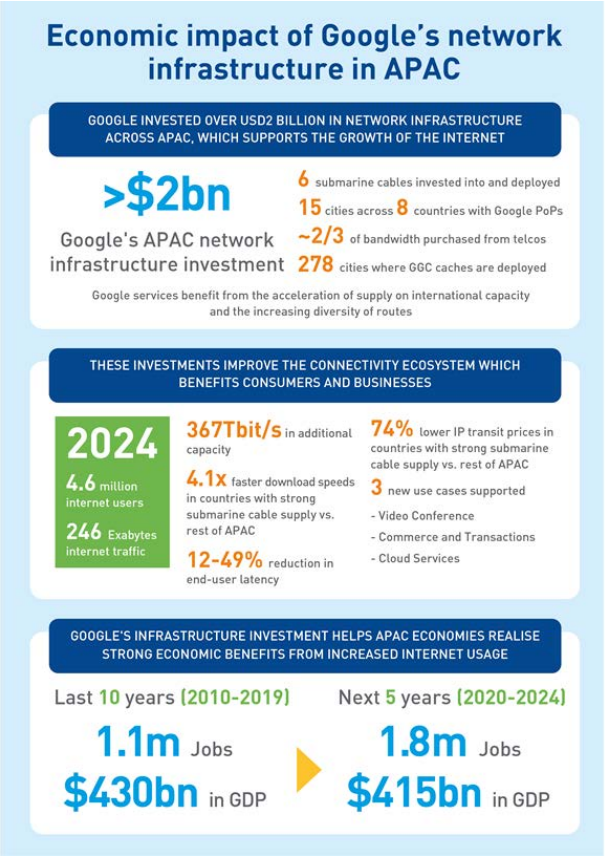
Google's investment in network infrastructure in APAC

- Google has invested over USD 2 billion in network infrastructure in APAC since 2010, contributing to improved connectivity outcomes, which support 1.1million additional jobs and USD 430 billion in additional GDP for the region
  - continued networking investments from Google are expected to support 1.8 million additional jobs and drive additional economic benefits of approx USD 415 billion in GDP (real in 2019 USD) over the next five years (2020-24)

- These investments create positive impacts on the connectivity ecosystem across APAC, reducing the price of internet connectivity, reducing internet latency, and increasing the speeds that people can access
  - further, greater capacity leads to improved resilience and reliability, and result in a better experience for users for current and emerging new applications and uses



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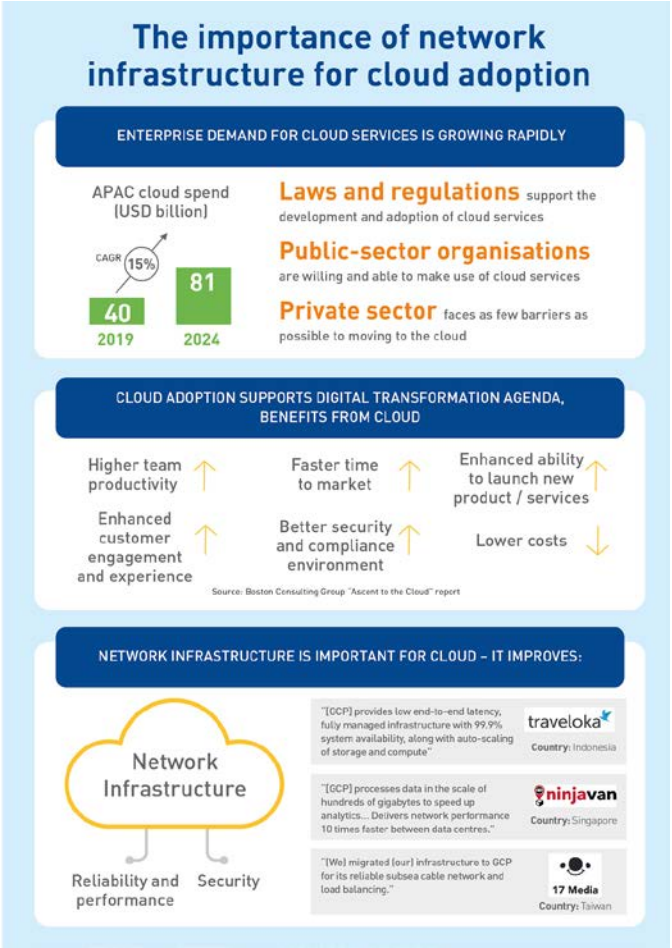
Why investment in network infrastructure is important for cloud adoption

- Google's network infrastructure connect various cloud regions with each other, providing cloud customers with access to resources beyond the cloud region they are based in and enhances the performance and reliability of Google Cloud
- Because of these investments, Google Cloud traffic is less reliant on the public internet and can withstand traffic surges during extraordinary events that are important to cloud customers
- Besides improving the performance of cloud services, Google's network infrastructure investments underpin, at the infrastructure layer, a wide suite of cloud security controls and tools
- GCP customer traffic carried on Google's own network is shielded from internet exposure, making it less likely that it will be attacked, intercepted or manipulated by malicious actors

Google Cloud



Why a supportive regulatory and investment regime matters

- Regulatory and investment regimes across APAC play a critical role in influencing the supply of subsea cables in each economy
- Economies with strong subsea cable supply typically have conducive regulatory and investment policies
- These strong regulatory systems, supported by transparent and well-enforced laws, provide best practices on how other economies can attract more investments

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