

Sponsors of Tomorrow. 

Computing Evolution & Revolution

A Global Growth Engine

Navin Shenoy

Vice President

General Manager, Intel Asia Pacific



GLOBAL FINANCIAL TURBULENCE

The New York Times
September 14, 2008

**Lehman Files for Bankruptcy,
Merrill is Sold**

**FBI Probing Fannie,
Freddie, AIG, Lehman in
Subprime Collapse**

Bloomberg
September 24, 2008

The Herald
September 22, 2008

**Wall Street Collapses
After Bailout Rejected**

USA
TODAY
October 6, 2008

**Stocks Plunge as Dow Drops
Below 10,000 on Global Fears**

**Treasury sells \$22 billion
in bills with no yield**

Forbes
June 29, 2008

Icelandic Meltdown

MarketWatch
December 21, 2008



2009

Sponsors of Tomorrow.

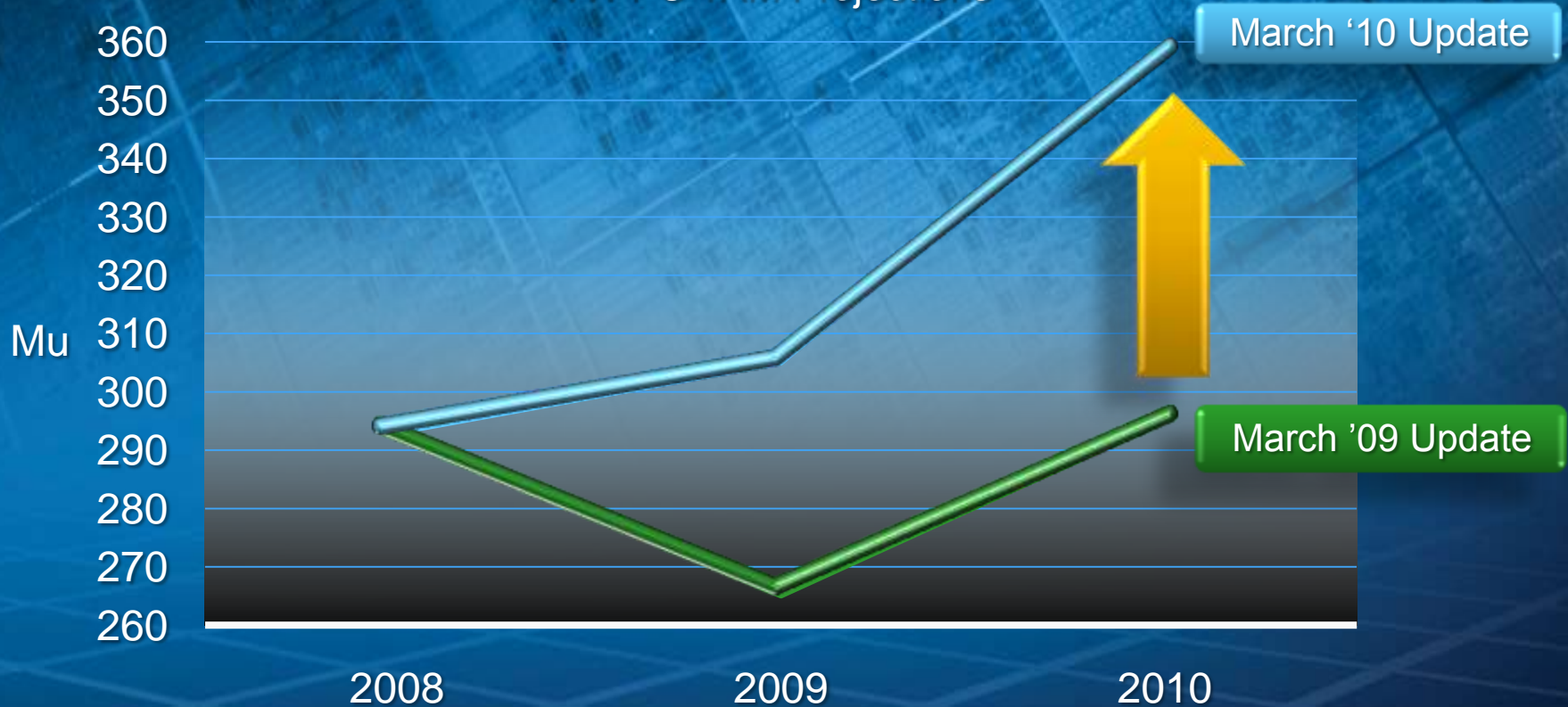


2009



Rising Expectations For The PC

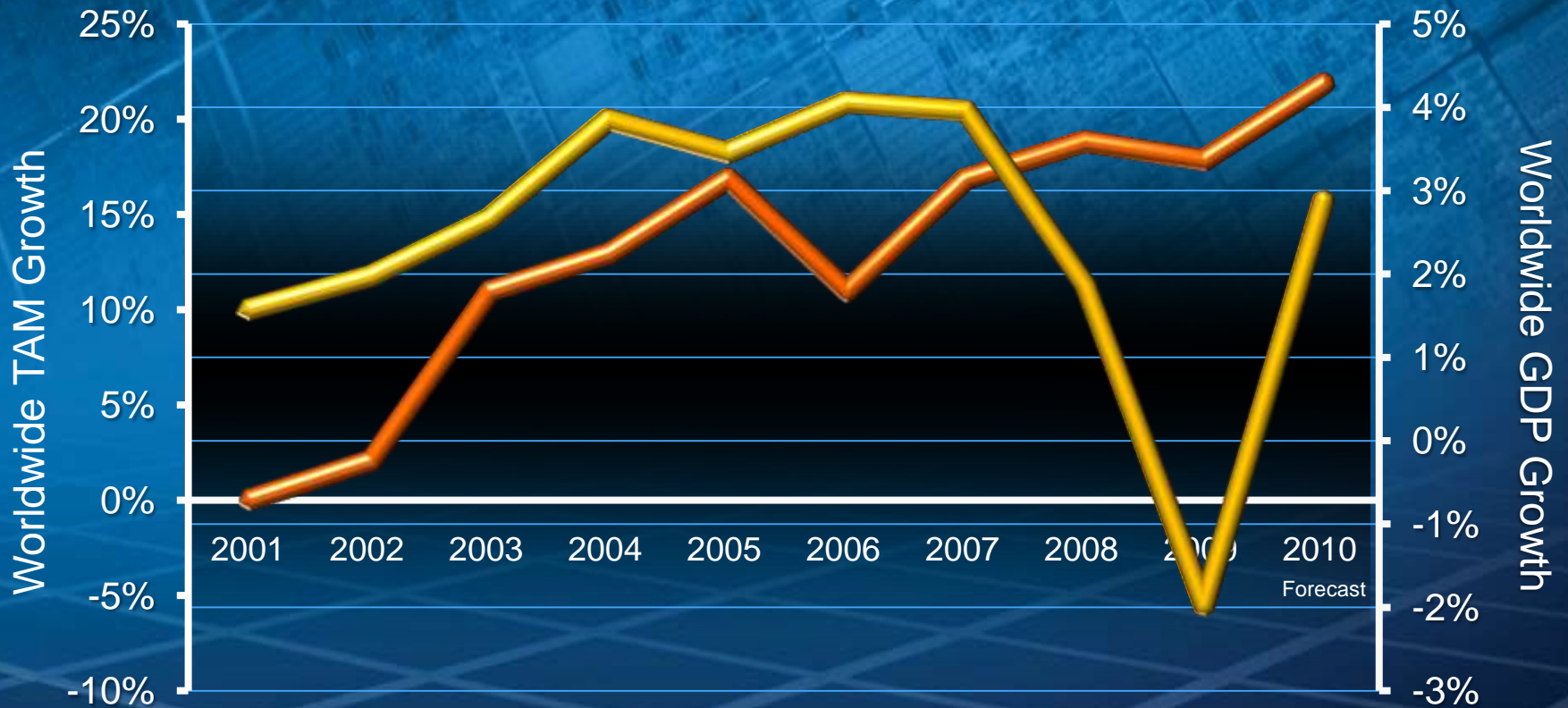
WW PC TAM Projections



What a Difference a Year Makes!

Does Consumer PC Defy Economic Trend?

Consumer TAM WW GDP



Top 10 Holiday Wish List Items

2007

MP3 Player
Notebook/Laptop
Video Game Console
Digital camera
TV
Desktop Computer
HDTV
DVD Player
Camcorder
Flat Panel TV


2008

Notebook/Laptop
Flat Panel TV
Mobile Phone
MP3 Player
Video Game System
DVD Player
Digital Camera
GPS
Camcorder
DVR

2009

Notebook/Laptop
MP3 Player
Flat Panel TV
Video Game System
Digital Camera
Kindle* / E-reader
iPhone*
Blu-Ray* player
Desktop PC
Other Smartphones

PC is a Necessity...

Sponsors of Tomorrow. 



PCs Defy Economic Turbulence

Intel Architecture Spans the Compute Continuum



Servers / Cloud



Desktops

Laptops

Netbooks

Personal
Devices

Smartphones

Smart TVs

Embedded

Intel Architecture

Sponsors of Tomorrow.



Intel Architecture Spans the Compute Continuum



Servers / Cloud



Desktops

Laptops



Netbooks



Personal
Devices



Smartphones



Smart TVs



Embedded



Intel Architecture

Sponsors of Tomorrow.



The Rise of “Differentiated PCs”



Enthusiast



Enthusiast



Ultra-thin Laptop



Volume PCs



Lifestyle



Netbook



Entry Desktop

Desktop: Unlocked and Unleashed!

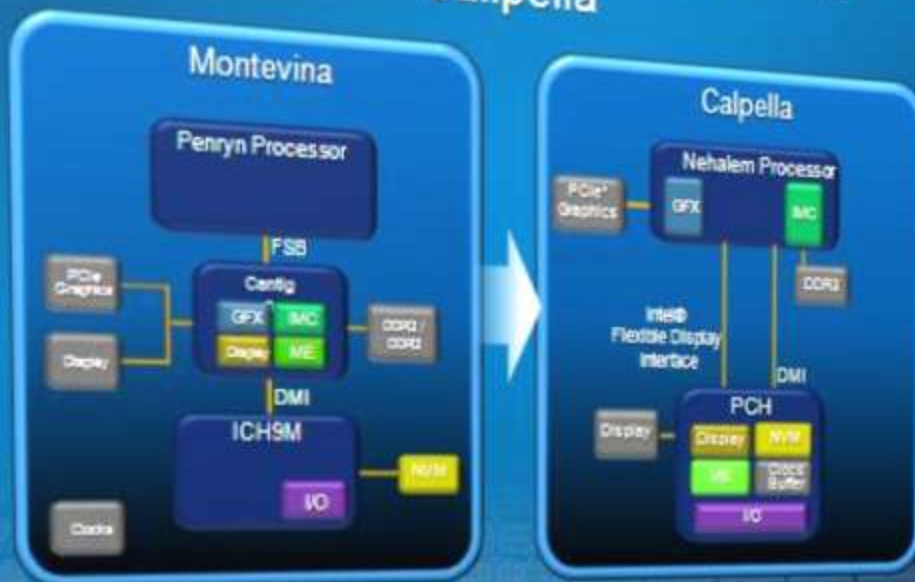
Introducing New Intel® Core™ i7-875K and i5-655K Processors



- First unlocked Intel® Core™ processors designed for mainstream
- Delivers lightning fast gaming and multimedia experience

Sponsors of Tomorrow. 

Next Revolution in Mobile Computing: Calpella



2009




INTRODUCED AT CES:
The All New 2010 Intel® Core™
Processor Family

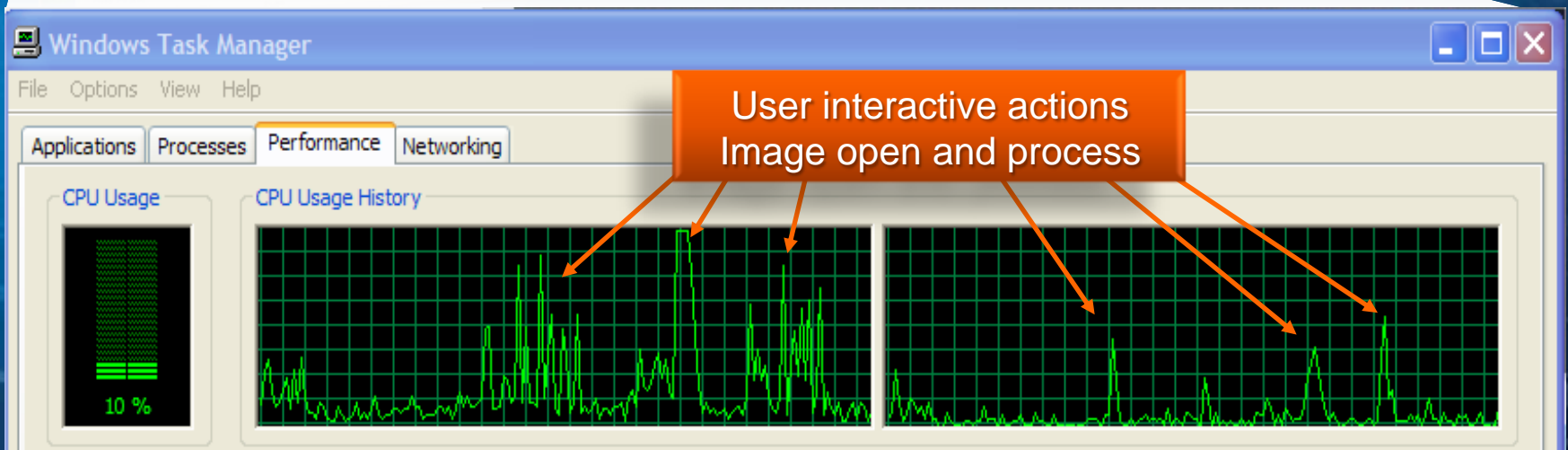
Intel® Turbo Boost Technology
Intel® Hyper-Threading Technology
Intel® HD Graphics



Center of Your Digital Life!

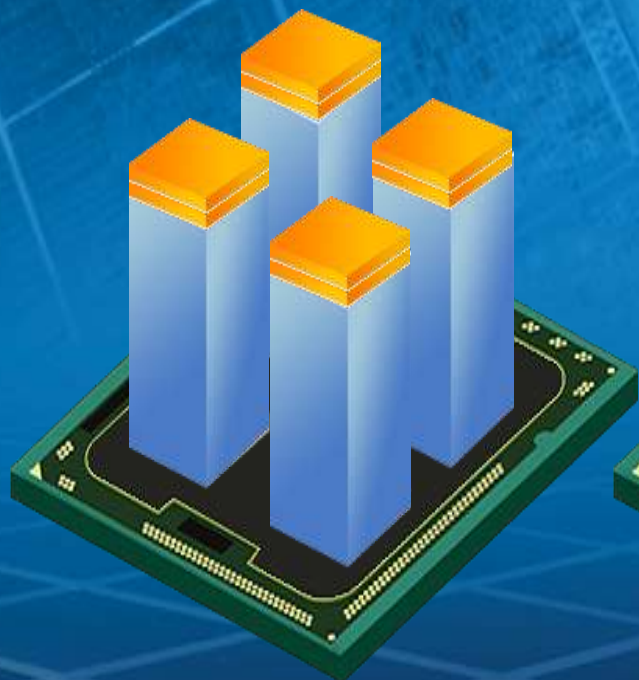
Sponsors of Tomorrow. 

Performance & Responsiveness: *Who Needs It?*

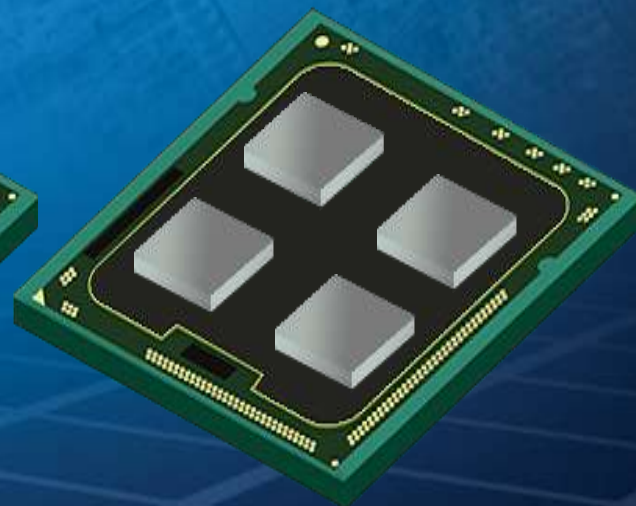
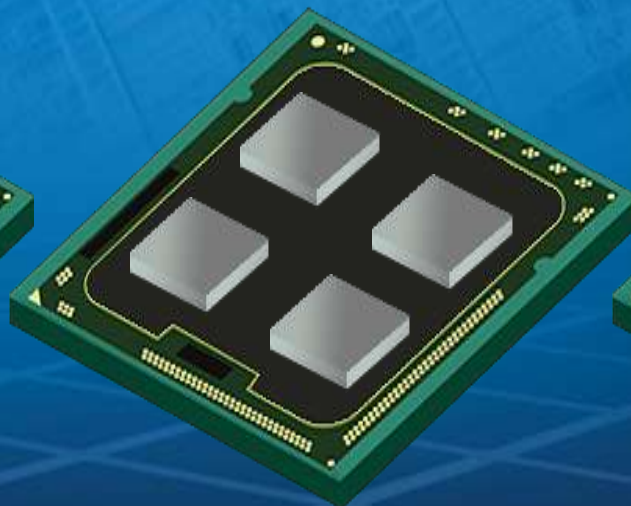


Intel® Turbo Boost Technology

Dynamically Delivering Optimal Performance & Energy Efficiency



Four-Core Turbo



Intel® Turbo Boost Technology

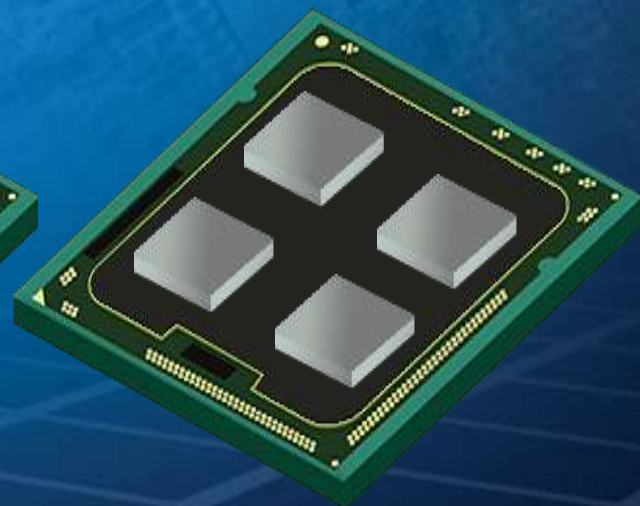
Dynamically Delivering Optimal Performance & Energy Efficiency



Four-Core Turbo

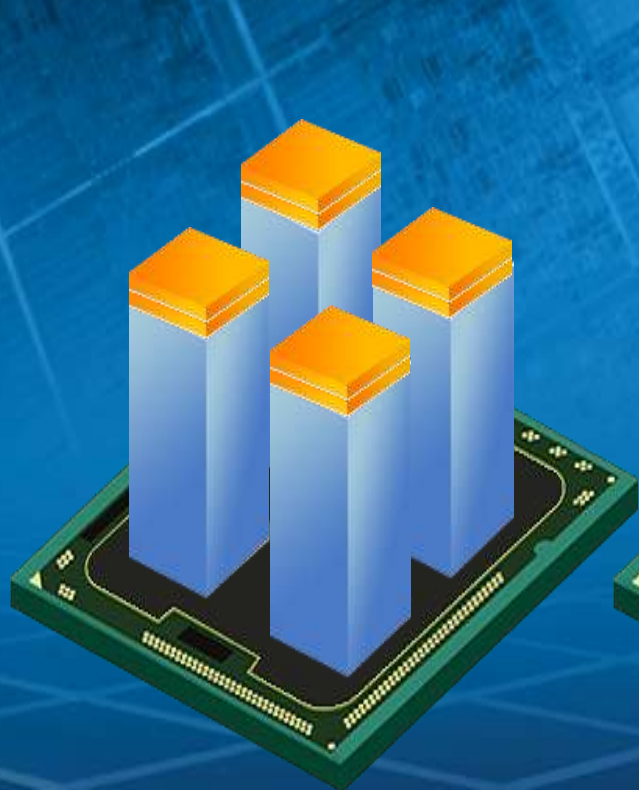


Two-Core Turbo



Intel® Turbo Boost Technology

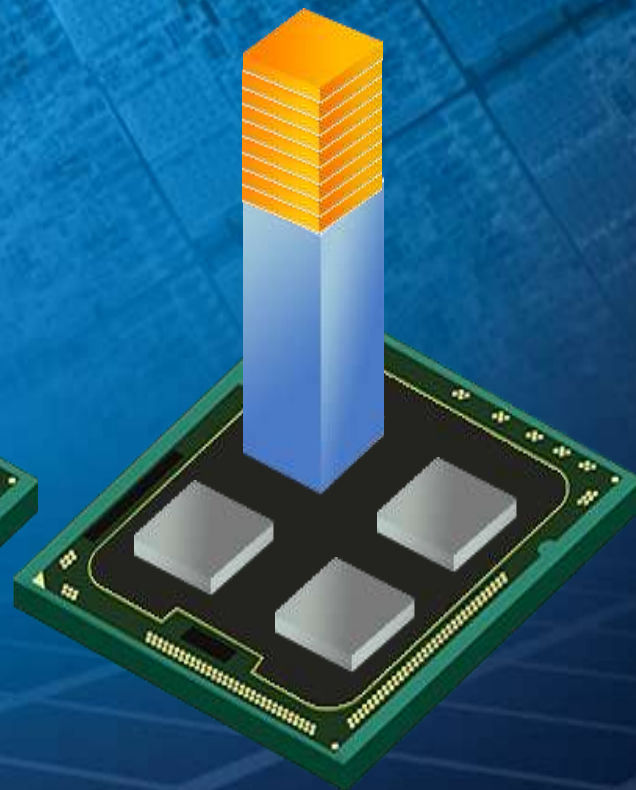
Dynamically Delivering Optimal Performance & Energy Efficiency



Four-Core Turbo



Two-Core Turbo




Single-Core Turbo

The All New 2010 Intel® Core™ Processor Family

Intel® Turbo Boost Technology
Intel® Hyper-Threading Technology
Intel® HD Graphics




Center of Your Digital Life!

Sponsors of Tomorrow. 

>1,800,000,000

OVER 1.8B GLOBAL INTERNET USERS

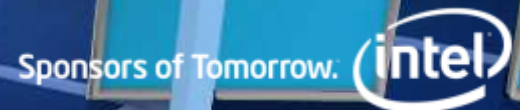


Sponsors of Tomorrow. 

Source: <http://www.internetworldstats.com/stats.htm>

>1,000,000,000,000

OVER ONE TRILLION WEBPAGES




The New Connected Experience

Social Networking Web Sites

859M Unique Users, **232B** Minutes Spent, **+50%** YoY



Source: Morgan Stanley, "Internet Trends", April - 2010

Sponsors of Tomorrow. 

Five Years of YouTube

>2,000,000,000

YouTube* SERVING
TWO BILLION DAILY VIEWS

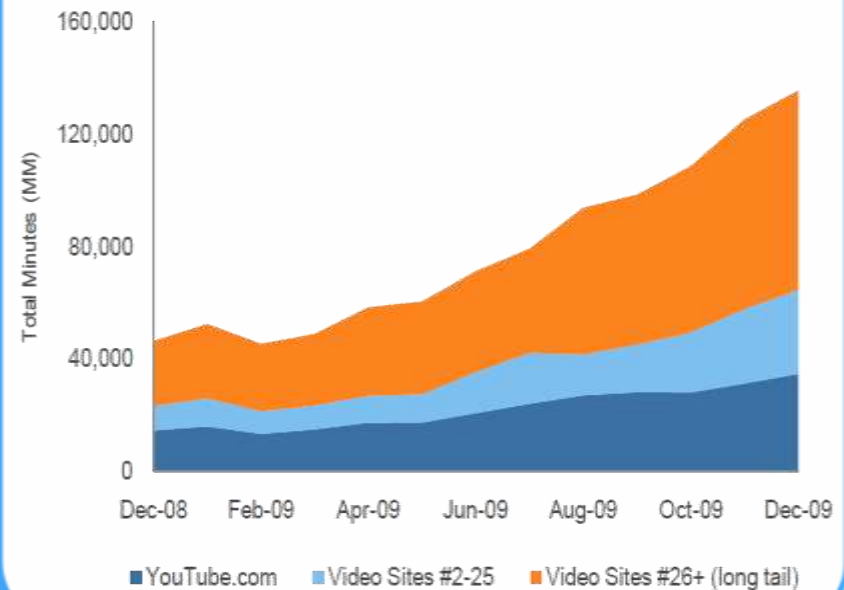
Sponsors of Tomorrow. 

Source: <http://youtube-global.blogspot.com/2010/05/at-five-years-two-billion-views-per-day.html>

The Visual Experience

Portal (Regions)	Photos / Month
Facebook	3,000,000,000
Tencent (PRC)	2,800,000,000
Orkut (Lat Am)	800,000,000

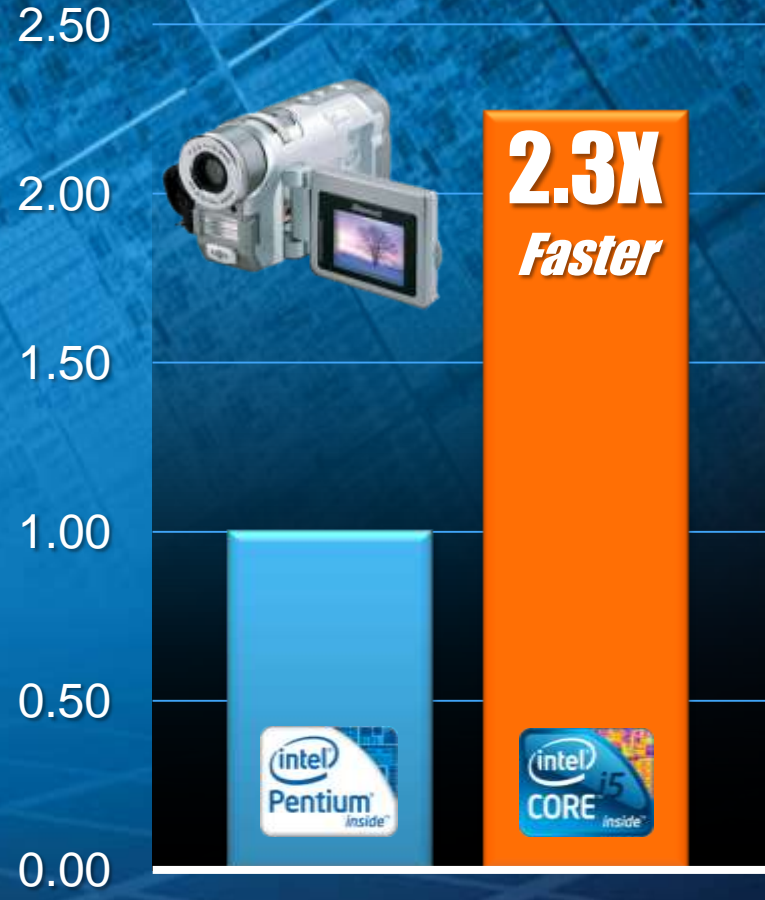
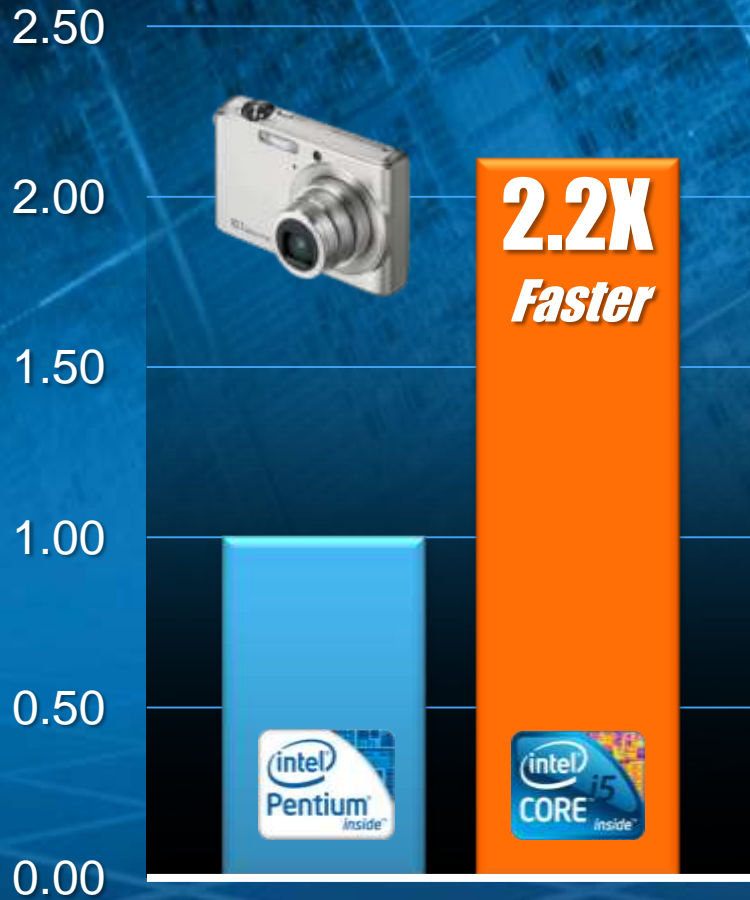
U.S. Video Viewing Trend by Total Duration
December 2008 to December 2009



Mainstream for Consumers


Adobe* Photoshop* Lightroom
Photo Editing

TMPGEnc* Xpress* 4.7
Video Conversion



- Intel® Pentium® Processor T4300
- Intel® Core™ i5-520M Processor

- Intel® Pentium® Processor T4300
- Intel® Core™ i5-520M Processor

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Intel® Wireless Display Strong Momentum Building

Available Today



NETGEAR®

TOSHIBA



SONY®



>10 OEMs with >20 SKUs available to retailers

Other brands and names are the property of their respective owners.

Sponsors of Tomorrow. The Intel logo, featuring the word "intel" in a lowercase, sans-serif font inside a white circle.


How It Works



Next-Generation Intel® Core™ processors (Codenamed Sandy Bridge)



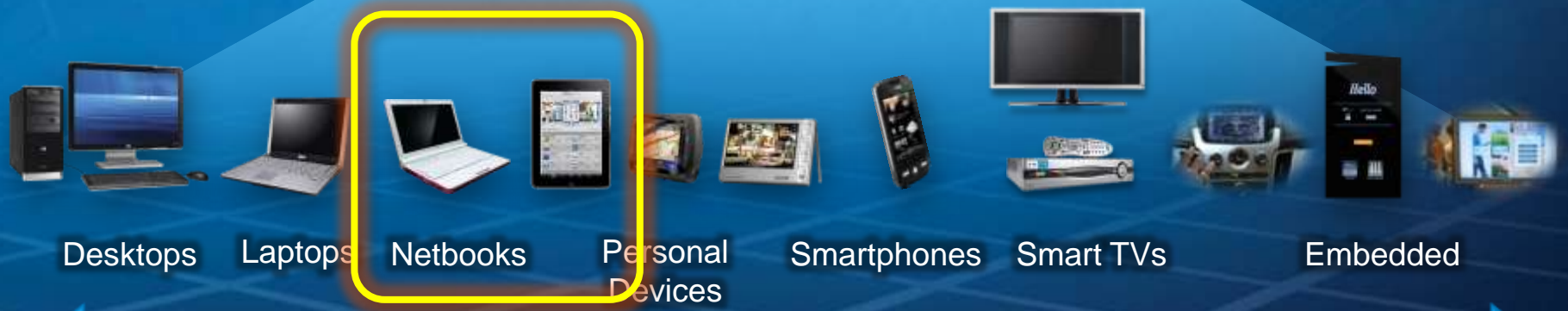
- Incredible smart performance for high-end and mainstream apps
- Stunning Media & Visual experience, significantly advanced graphics
- Long battery life
- Flexible & optimized platforms

Sponsors of Tomorrow. 

Intel Architecture Spans the Compute Continuum



Servers / Cloud



Desktops

Laptops

Netbooks

Personal
Devices

Smartphones

Smart TVs

Embedded

Intel Architecture

Netbooks: Fueling New IA TAM Growth Tablets: Additional Opportunity...



Intel® Atom™ Enabling New Form Factors and Interfaces



Intel® Atom™ Enabling New Form Factors and Interfaces



Evolution of the Netbook Market

Yesterday

Category Creation



Intel® Atom™ processor launch
June 2008



OEM first movers
enter the
market...



...followed quickly
by other OEMs

Today

Consumer &
Channel Expansion

CONSUMER EXPANSION

Fashion/Style



Kids



Tech Savvy



First Time Buyer



and more...

CHANNEL EXPANSION

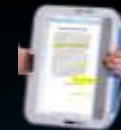
Service Providers

New Retail

Emerging Markets

Future

Form Factor &
Content Innovation



Form Factor
Innovation



Applications



Digital Content

eBooks
Newspapers



Rich Media



Sponsors of Tomorrow.







持ち歩くことが楽しくなる
小さくカラフルなボディ



School's
easy when
you have a
little help

ASUS *Eee PC* Making School - And Life - Easy!

From going to school without my lovely Eee PC, that's no surprise when it's so light and so comfortable to my bag, at less than 1 kg and half the size of A4.

But don't judge a book by its cover! Despite its petite size, it packs a punch with the processing capability and full wireless connectivity. It's so simple to go online to do my research and so easy to do my homework using its user-friendly interface. And I know my files are in good hands, because my Eee PC has a Solid-state drive (SSD) designed to help storage to withstand all kinds of knocks and bumps that can happen.

It all sounds very serious but it's actually a lot of fun too. I use my

Eee PC to view, view and listen to videos, images, music and ebooks; update blogs and upload photos and videos. I even use it for video conferencing. It's so easy with the integrated webcam and microphone.

Compact and cute - use heavily and tough as nails... my Eee PC is everything I need for studying and playing!



entete®



Razem od pierwszej klasy



Odkryj nowy edukacyjny netbook **Entete** z procesorem Intel® Atom™ w zestawie z cyklami edukacyjnymi WSIP

Sponsors of Tomorrow.

Evolution of the Netbook Market

Yesterday

Category Creation



Intel® Atom™ processor launch
June 2008



OEM first movers
enter the
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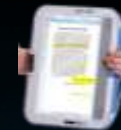
Service Providers

New Retail

Emerging Markets

Future

Form Factor &
Content Innovation



Form Factor
Innovation



Applications



Digital Content

eBooks
Newspapers



Rich Media



Sponsors of Tomorrow.





**It's Not Only About Affordability,
It's About Desirability**


Introducing: Dual Core Intel® Atom™ Processors for Netbooks



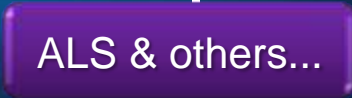
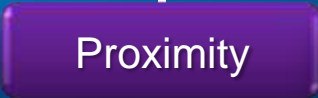
- 2 physical cores and 4 threads
- More responsive web browsing
- Snappier experience using more than one application at a time
- Enhanced video playback
- Great battery life

Coming Your Way Next Quarter

All products and dates specified are preliminary and are subject to change without notice.

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“Always Aware” Netbook



Intel® Atom™ Enabling New Form Factors and Interfaces



IA: The Platform of Choice

Netbooks and Tablets

PC Device/Ecosystem Compatibility

IA x86 Arch,
Leading Edge
Manufacturing

Industry Standard
Technologies:
USB, PCIe,
HDMI, SATA,
DDR2/3, ...



Performance Leader

Performance for
Multitasking with
Rich Media

Interactive User
Experience



Port of Choice Flexibility

PC Windows*,
MeeGo™ Linux,
Android* &
Chrome*

Custom UIs,
Allows for OEM
Differentiation

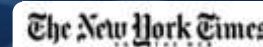


Open SW Ecosystem

PC Windows*
Programs

Intel® AppUp
Center

eBooks,
Magazines, &
Newspapers



Rich Internet Support

Web Pages Load
without Error

Your Favorite
Content plays:
YouTube*, Hulu*,
Netflix*, ...

Support for Adobe
Flash* & MS
Silverlight*



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Enabling a Tablet Ecosystem

MeeGo™ Industry Momentum

OSVs



ISVs



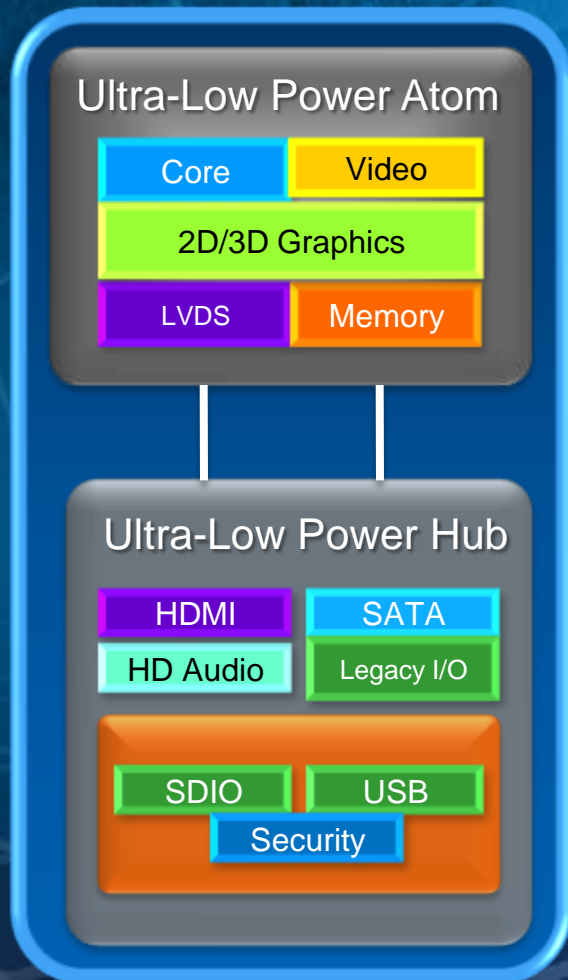
OEMs/ODMs



Service Providers



Introducing: Oak Trail for Tablets & Sleek Netbooks

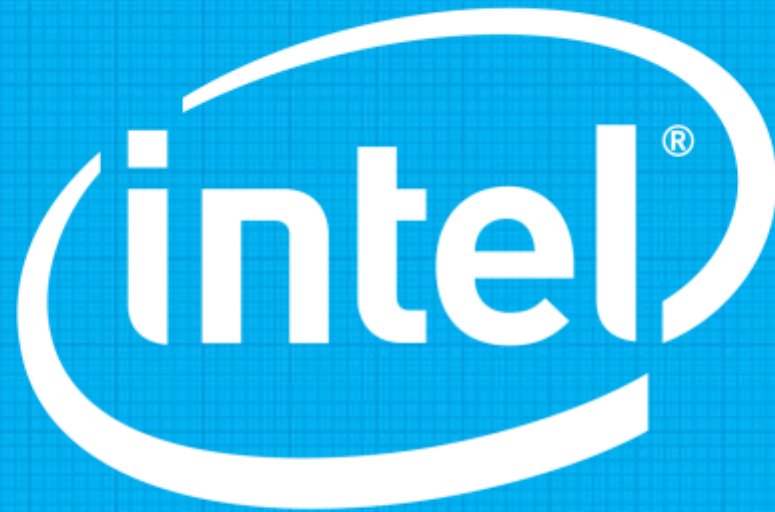


- OS Port of Choice, thinner and more innovative form factors
- Longer battery life
 - Significantly lower power compared to current netbook platforms
- Rich media and graphics
 - 1080p video decode and HDMI support

In Summary...

- The PC market segment is strong; and significant growth opportunity in front of us.
- Revolutionary products and technologies will fuel the growth. Nehalem is winning the Client. Sandy Bridge will rock and will change the way we interact with our computers.
- Netbook segment has been established , and is expanding the TAM. Additional opportunity with both Netbook & Tablet.

Performance that Delivers Compelling User Experience



Sponsors of Tomorrow.™

Risk Factors

Today's presentations contain forward-looking statements. All statements made that are not historical facts are subject to a number of risks and uncertainties, and actual results may differ materially. Please refer to our most recent Earnings Release and our most recent Form 10-Q or 10-K filing available on our website for more information on the risk factors that could cause actual results to differ.

Risk Factors

The above statements and any others in this document that refer to plans and expectations for the second quarter, the year and the future are forward-looking statements that involve a number of risks and uncertainties. Many factors could affect Intel's actual results, and variances from Intel's current expectations regarding such factors could cause actual results to differ materially from those expressed in these forward-looking statements. Intel presently considers the following to be the important factors that could cause actual results to differ materially from the corporation's expectations. Demand could be different from Intel's expectations due to factors including changes in business and economic conditions; customer acceptance of Intel's and competitors' products; changes in customer order patterns including order cancellations; and changes in the level of inventory at customers. Intel operates in intensely competitive industries that are characterized by a high percentage of costs that are fixed or difficult to reduce in the short term and product demand that is highly variable and difficult to forecast. Additionally, Intel is in the process of transitioning to its next generation of products on 32nm process technology, and there could be execution issues associated with these changes, including product defects and errata along with lower than anticipated manufacturing yields. Revenue and the gross margin percentage are affected by the timing of new Intel product introductions and the demand for and market acceptance of Intel's products; actions taken by Intel's competitors, including product offerings and introductions, marketing programs and pricing pressures and Intel's response to such actions; defects or disruptions in the supply of materials or resources; and Intel's ability to respond quickly to technological developments and to incorporate new features into its products. The gross margin percentage could vary significantly from expectations based on changes in revenue levels; product mix and pricing; start-up costs, including costs associated with the new 32nm process technology; variations in inventory valuation, including variations related to the timing of qualifying products for sale; excess or obsolete inventory; manufacturing yields; changes in unit costs; impairments of long-lived assets, including manufacturing, assembly/test and intangible assets; the timing and execution of the manufacturing ramp and associated costs; and capacity utilization. Expenses, particularly certain marketing and compensation expenses, as well as restructuring and asset impairment charges, vary depending on the level of demand for Intel's products and the level of revenue and profits. The majority of our non-marketable equity investment portfolio balance is concentrated in the flash memory market segment, and declines in this market segment or changes in management's plans with respect to our investment in this market segment could result in significant impairment charges, impacting restructuring charges as well as gains/losses on equity investments and interest and other. Intel's results could be impacted by adverse economic, social, political and physical/infrastructure conditions in countries where Intel, its customers or its suppliers operate, including military conflict and other security risks, natural disasters, infrastructure disruptions, health concerns and fluctuations in currency exchange rates. Intel's results could be affected by the timing of closing of acquisitions and divestitures. Intel's results could be affected by adverse effects associated with product defects and errata (deviations from published specifications), and by litigation or regulatory matters involving intellectual property, stockholder, consumer, antitrust and other issues, such as the litigation and regulatory matters described in Intel's SEC reports. An unfavorable ruling could include monetary damages or an injunction prohibiting us from manufacturing or selling one or more products, precluding particular business practices, impacting our ability to design our products, or requiring other remedies such as compulsory licensing of intellectual property. A detailed discussion of these and other factors that could affect Intel's results is included in Intel's SEC filings, including the report on Form 10-Q for the quarter ended March 27, 2010.

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- WiMAX connectivity requires a WiMAX enabled device and subscription to a WiMAX broadband service. WiMAX connectivity may require you to purchase additional software or hardware at extra cost. Availability of WiMAX is limited, check with your service provider for details on availability and network limitations. Broadband performance and results may vary due to environment factors and other variables. See www.intel.com/go/wimax for more information.
- Intel® My WiFi Technology is an optional feature and requires additional software and a Centrino® wireless adapter. Wi-Fi devices must be certified by the Wi-Fi Alliance for 802.11b/g/a in order to connect. See mywifi.intel.com for more details.
- Hyper-Threading Technology requires a computer system with a processor supporting HT Technology and an HT Technology-enabled chipset, BIOS and operating system. Performance will vary depending on the specific hardware and software you use. For more information including details on which processors support HT Technology, see [here](#).
- Intel® Anti-Theft Technology (Intel® AT). No computer system can provide absolute security under all conditions. Intel® AT requires the computer system to have an Intel® AT-enabled chipset, BIOS, firmware release, software and an Intel® AT-capable service provider/ISV application and service subscription. The detection (triggers), response (actions), and recovery mechanisms only work after the Intel® AT functionality has been activated and configured. Certain functionality may not be offered by some ISVs or service providers and may not be available in all countries. Intel assumes no liability for lost or stolen data and/or systems or any other damages resulting thereof.
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