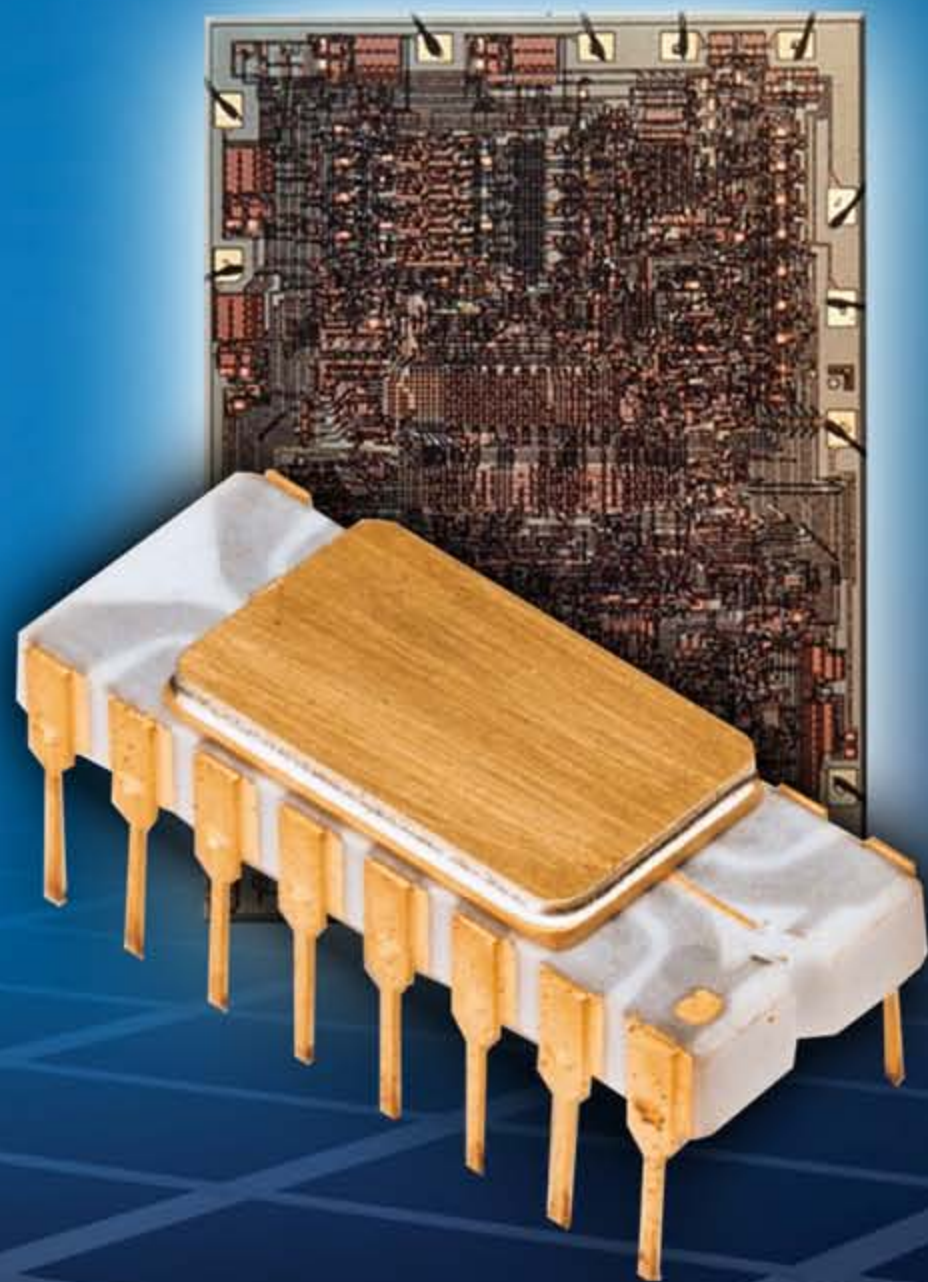


Sponsors of Tomorrow.™

The Best is Yet to Come...



Dadi Perlmutter
Executive Vice President
Intel Architecture Group





Compute Continuum



Renee J. James
Senior Vice President
General Manager, Software and Services Group



Delivering on the Intel Compute Continuum

Servers/Cloud



Desktops



Laptops



Netbooks



Personal Devices



Smart-phones



Smart TVs



IVI Embedded



Application Distribution Channels

Developer Programs and Support

Operating Environment

Intel® Architecture



Delivering on the Intel Compute Continuum

Servers/Cloud



Desktops



Laptops



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Smart-phones



Smart TVs



IVI Embedded



Application Distribution Channels

Developer Programs and Support

Operating Environment

Intel® Architecture



MeeGo*

Bringing a Unified Operating Environment to Intel® Atom™-based Devices

Netbooks & Entry
Level DTs



Tablets



Smart
TV



Handsets



IVI



Media
Phone



MeeGo

Single Unified Operating Environment



Platforms based on Intel® Atom™ processors

“MeeGo lowers complexity for Asus targeting multiple market segments like netbooks and tablets.”

—Samson Hu

Vice President, ASUS System Business Group
Manager, Eee System Business Group



*Other trademarks and brands are properties of third party companies



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IVI Embedded



Application Distribution Channels

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Intel® Architecture



Intel® AppUp™ Store Partnership

The screenshot displays the ASUS App Store interface. At the top left, the logo reads "asus app store". A navigation menu on the left includes "Store" and "My Apps". The main content area features a large banner for the "Music Player" app, which has 818 reviews and a price of \$1.99. Below this, there are three sections: "Staff Picks" (Apps We Highly Recommend), "What's Hot" (Top Rated and Most Downloaded), and "New Releases". Each section lists several apps with their respective icons, names, star ratings, and prices.

Store

My Apps

Welcome, Thomas Anderson

Get Support
Advanced Search

Favorite Categories

- Communications
- Education
- Entertainment
- Games
- Home and Family
- Social

Music Player
(818 Reviews)
★★★★☆ BUY \$1.99

Staff Picks

Apps We Highly Recommend

- MacJong \$1.99 Buy App
- Who Has The Biggest Brain? \$1.99 Buy App
- Spaz \$1.99 Buy App

What's Hot

Top Rated Most Downloaded

- Imeem Mobile \$1.99 Buy App
- VSee Communications \$1.99 Buy App
- Evernote \$1.99 Buy App

New Releases

Check Out Our New Arrivals

- ZumoDrive \$1.99 Buy App
- YouCam \$1.99 Buy App
- World of Goo \$1.99 Buy App

Powered by

intel AppUp™

ASUS®



An Explosion of Internet Growth

Today

2015



More Users

25% of the World is Connected¹

>1 Billion Additional Users to the Cloud²

More Devices

~80% of those devices are Computers & Phones³

Connected Devices >10 Billion Globally³



More Content

2.5B Photos on Facebook⁴
30B Videos Viewed/Mos⁵

8X Network, 16X Storage & 20x Compute Capacity Needed⁶



Exponential Growth Driving Need for A Billion Virtual Server Cloud⁷



1. IDC "Server Market Forecast" 2009
2. IDC "The Internet Reaches Late Adolescence" Dec. 2009, extrapolation by Intel for 2015
3. EDC "Worldwide Device Estimates Year 2020 - Intel One Smart Network Work" forecast
4. <http://www.facebook.com/press/infopage/11813>
5. http://www.comscore.com/Press_Events/Press_Releases/2010/11/November_Sees_Number_of_US_Videos_Viewed_Online_Surpass_30_Billion_for_First_Time_on_Record
6. Network: 800 Terebytes / second of IP traffic estimate on Intel and Intel analysts "Network Supply Demand and 2010-2020" forecast. 16x Storage: 60 Exabytes of data stored from Barclays Capital "Storage Bb" Sept 2009, extrapolation by Intel for 2015; 20x Compute: Intel Internal URP forecast. Extrapolated to 1 billion virtual servers using 1 vml/core

The question then is how do we keep up with this deluge of data and build a better data center?



Foundation of a Data Center

Secure

Personal and company data protected at rest and in flight

Simplified

Flexible infrastructure with unified network

Efficient

World class component, platform and data center energy efficiency

Open

Multi-vendor innovation with compatibility of solutions



Data Center Roadmap Driven by Intel's Tick-Tock Cadence



The Efficiency Proof Point

Intel® Xeon® 5600 Processor

Up to **15x** Performance

Up to **95%** Energy Reduction

Estimated **5 Month** Payback

2 Socket Systems

Intel Xeon 7500 Processor

Up to **20x** Performance

Up to **91%** Energy Reduction

Estimated **12 Month** Payback

2, 4, 8+ Socket Systems



A Good Thing Gets Even Better



Intel® Cloud Builder Program

Open Cirrus™,
ETRI, IDA, MIMOS;
Universities



**Advanced
Cloud Research**

Intel Cloud Test Bed
POCs and Joint Labs
IT@Intel Case Studies



**Building
Optimized Clouds**

Cloud Reference
Architectures,
Tools and Training



**Deployment
Best Practices**

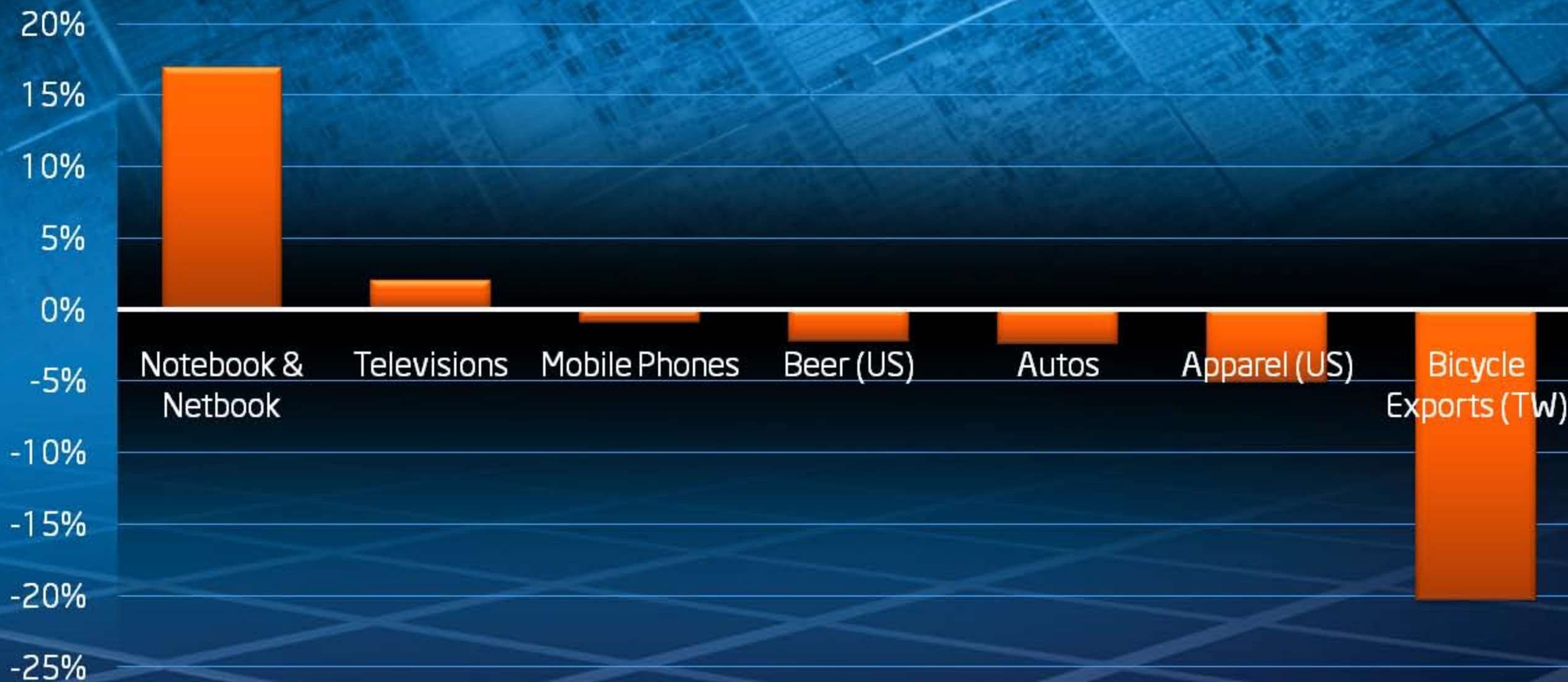
Industry Partnership NOW to Build the Cloud of the Future
Join Us - <http://www.intel.com/software/cloudbuilder>



Did any consumer product categories do better in 2009 versus 2008?



Hold the beer, wait on the bike but delay the PC purchase?? Never...





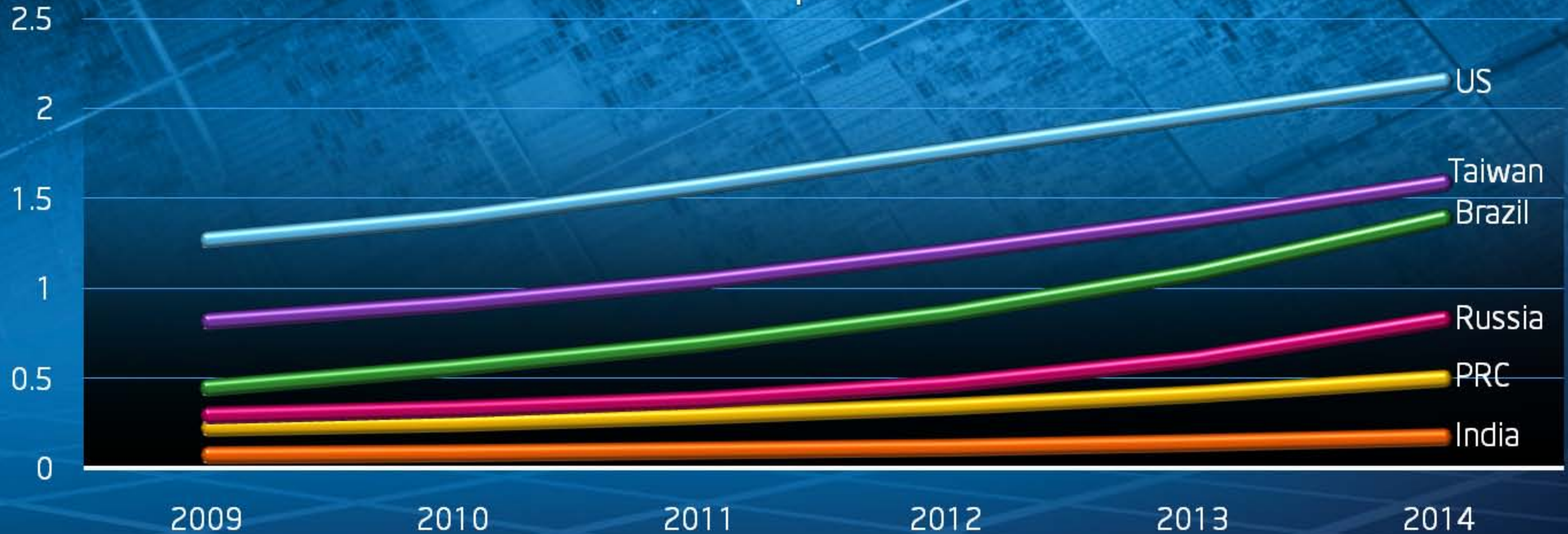
The Industry is Shipping
1 MILLION
PCs/DAY

And We'll Double That In 5 Years...



And Plenty of Room for Growth...

Number of PCs per Household



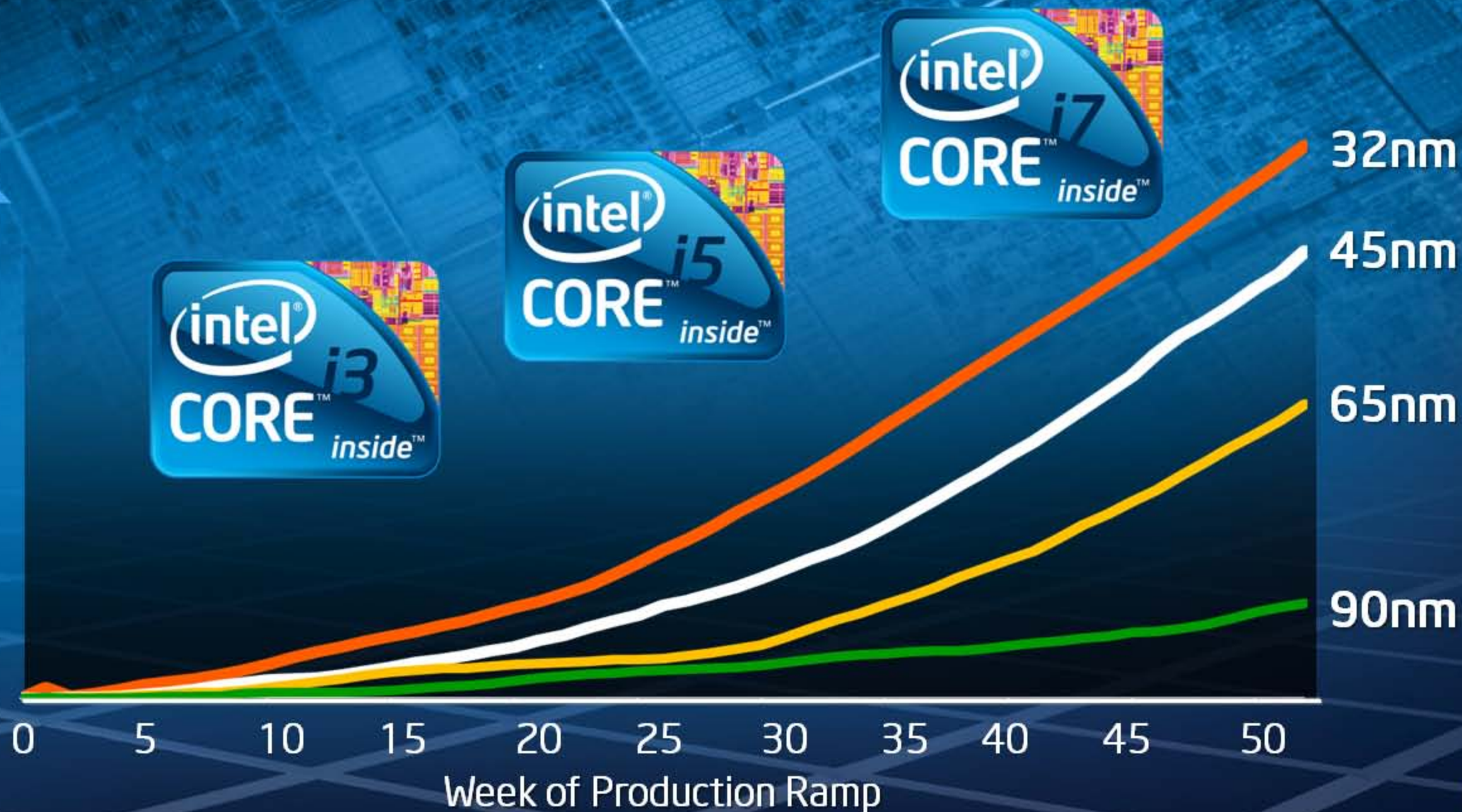
~2 Billion People Yet to Own Their "PC Experience"



32nm → Enabling the Fastest Ramp Ever



Millions
of CPUs



**A Superior Manufacturing Capability is Critical
but So too Are Compelling Usages**



Great Media Starts with a Great CPU...

ANANDTECH

"The Perfect Home Theater PC."
January 2010



"Video Playback was perfect and
image quality was excellent."
January 2010

...And Ends With A Complete Platform

Other names and brands may be claimed as the property of others



Coming this Summer

Watch Blu-ray Stereoscopic 3D Movies on PCs
Based on 2010 Intel® Core™ Processor with
Intel® HD Graphics

Blu-ray stereo 3D for
mainstream consumers!

- No extra discrete graphics card needed
- Passive polarized glasses



Intel® Wireless Display

We're Just Getting Started...

ASUS



lenovo



SONY

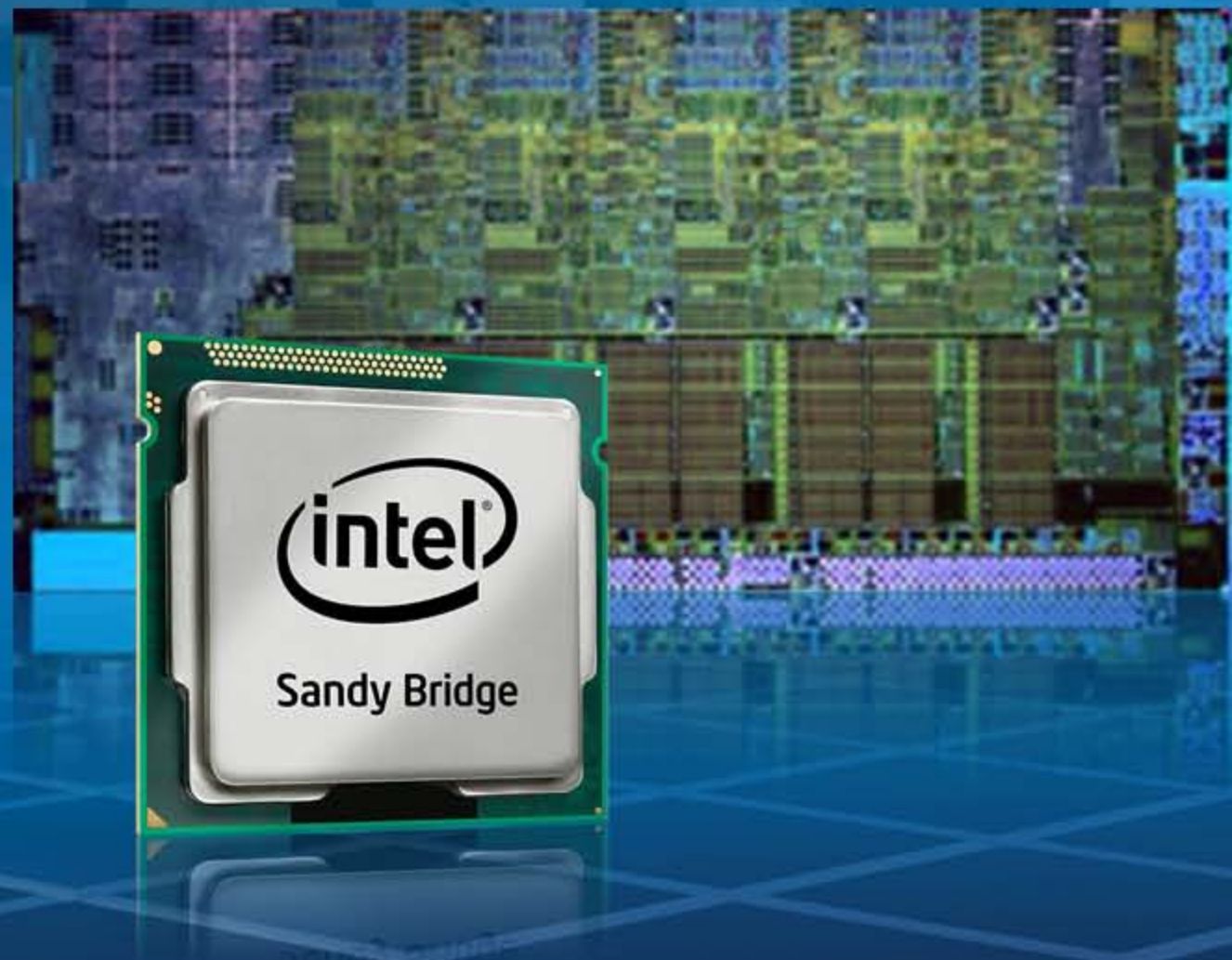
TOSHIBA
Leading Innovation >>>

*Expanding from 3 Designs In the
US to Over 30 Worldwide*



The Next Generation Intel® Core™ Processor

Code Name *Sandy Bridge*



- New 32nm Intel microarchitecture
- Impressive leap in energy-efficient performance
- Significant advances in media and 3D graphics capabilities
- Enhanced overall system performance generation to generation

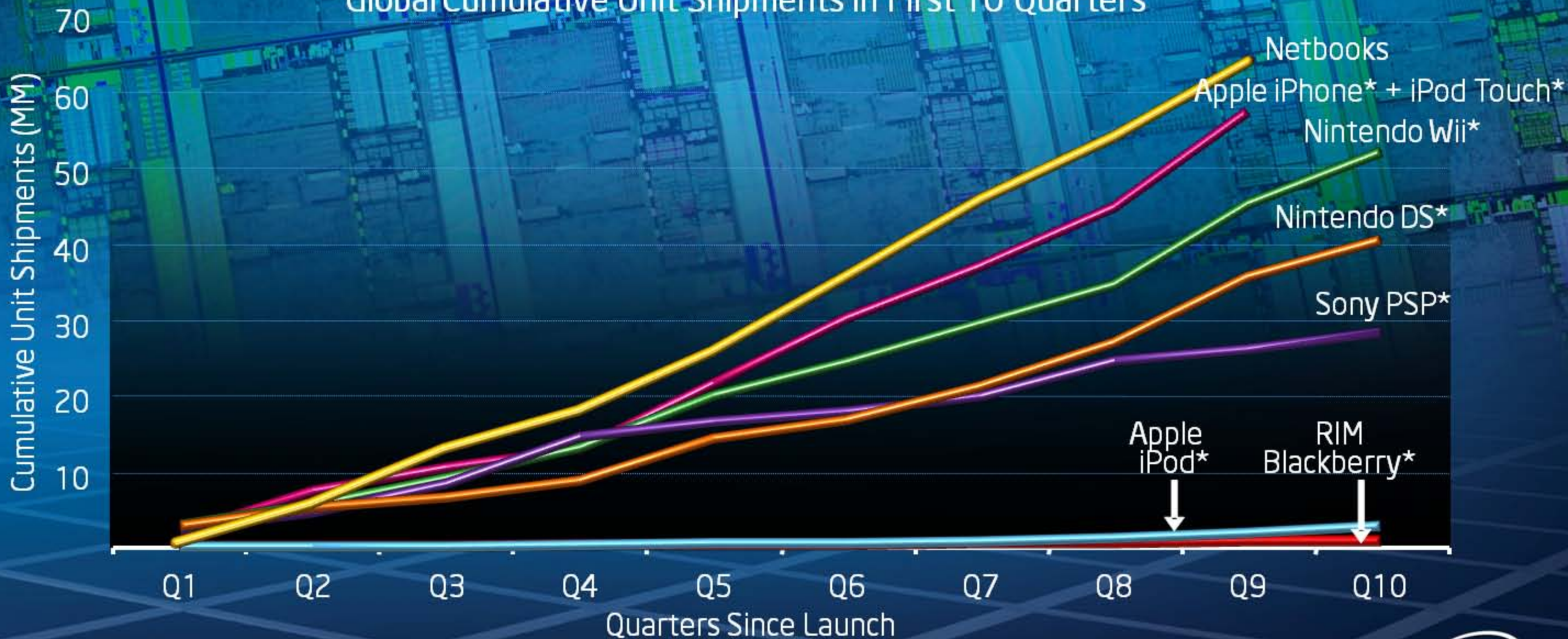


**What category ramped faster than the
Blackberry*, iPod* or Nintendo Wii*?**



Netbooks Take Off

Global Cumulative Unit Shipments in First 10 Quarters



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

Note: iPhone launched in CQ2:07; iPod launched in CQ4:01; Wii launched in CQ4:06; DS launched in CQ4:04; PSP launched in CQ1:05; Blackberry smartphone launched in C2002. Source: Apple, Nintendo, Sony, RIM, Katy Huberty, Morgan Stanley Research, Intel



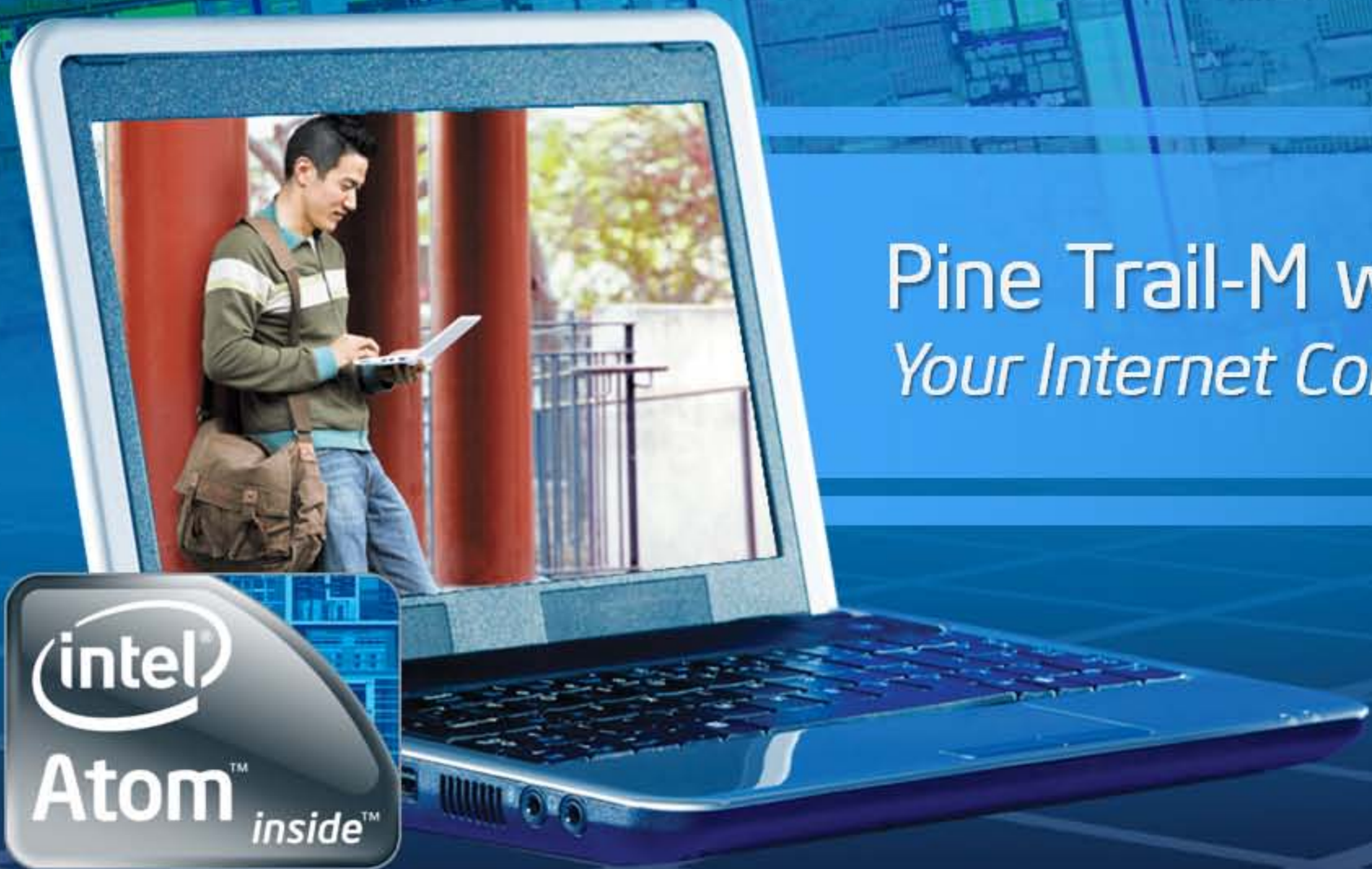
Second Wave of Netbook Innovation

New, exciting form factors

Dual-core performance and DDR3 in a Netbook



Introducing Dual Core Intel® Atom™ Processors for Netbooks



Pine Trail-M with Dual Core Processor
Your Internet Companion Just Got Better



Where will it go from here?



Intel® Atom™ Everywhere

The advertisement features a central collage of eight circular images, each showcasing a different application of Intel Atom technology. The images are arranged in a grid-like fashion, with some overlapping. Each image contains the Intel Atom Inside logo. The applications shown are:

- Nettop:** A man sitting at a desk with a small computer system.
- Handheld:** A woman looking at a smartphone.
- Home Automation:** A woman in a living room with a large screen and a control panel.
- Reader:** A man reading a book on a handheld device.
- Health Guide:** An elderly man looking at a screen, possibly a medical device.
- IP Phones:** A woman talking on a mobile phone.
- Infotainment:** A woman using a tablet device in a car's infotainment system.

Improving The World In Ways Beyond What We Have Imagined

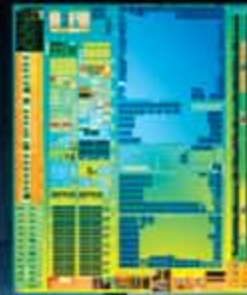
Intel® Atom™ is a Family of Solutions

Netbooks



N-series Atom™

Handhelds



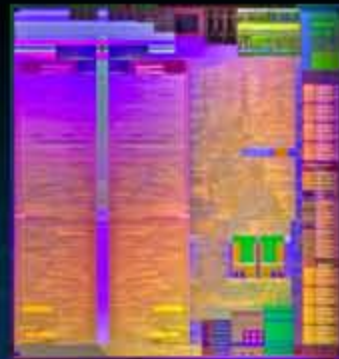
Z-series Atom

TV



CE-series Atom

Entry Desktops



D-series Atom

Embedded



Embedded Series Atom

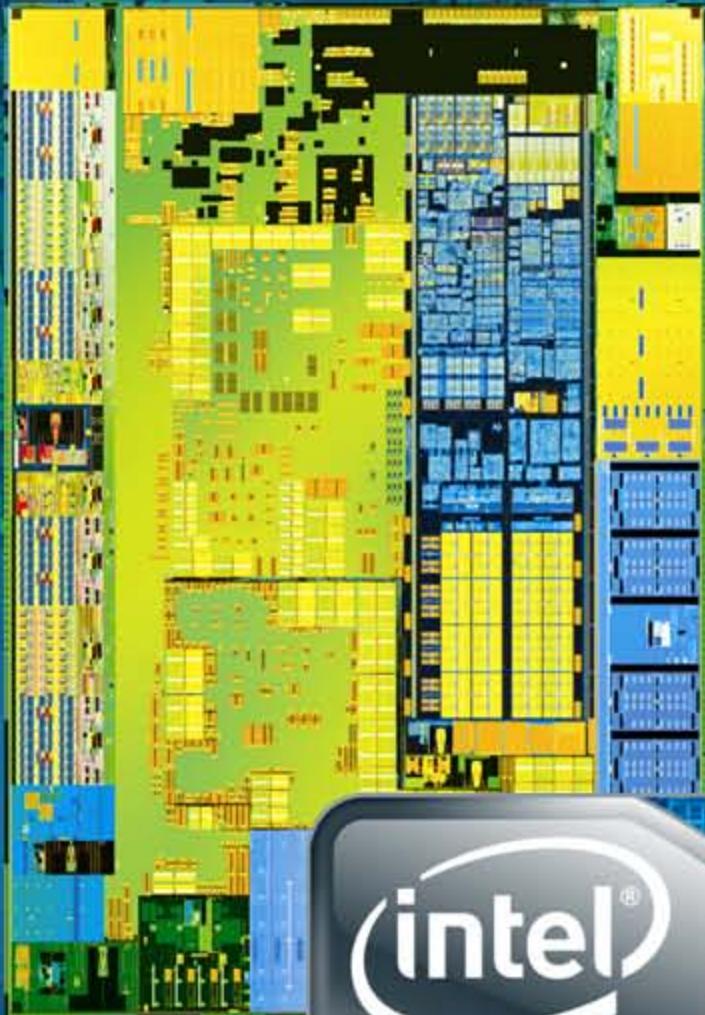
Gadgets



Future Atom SoCs



Intel® Atom™ Processor CE4100



IA Solutions for TVs



Not Actual Die Size



CE Industry Transitioning to Smart TV



1930s-2008: TV



'08-'09: Connected TV



2010+: Smart TV

The Transformation is Underway



Our CE Opportunity is Ramping Faster than Expected!



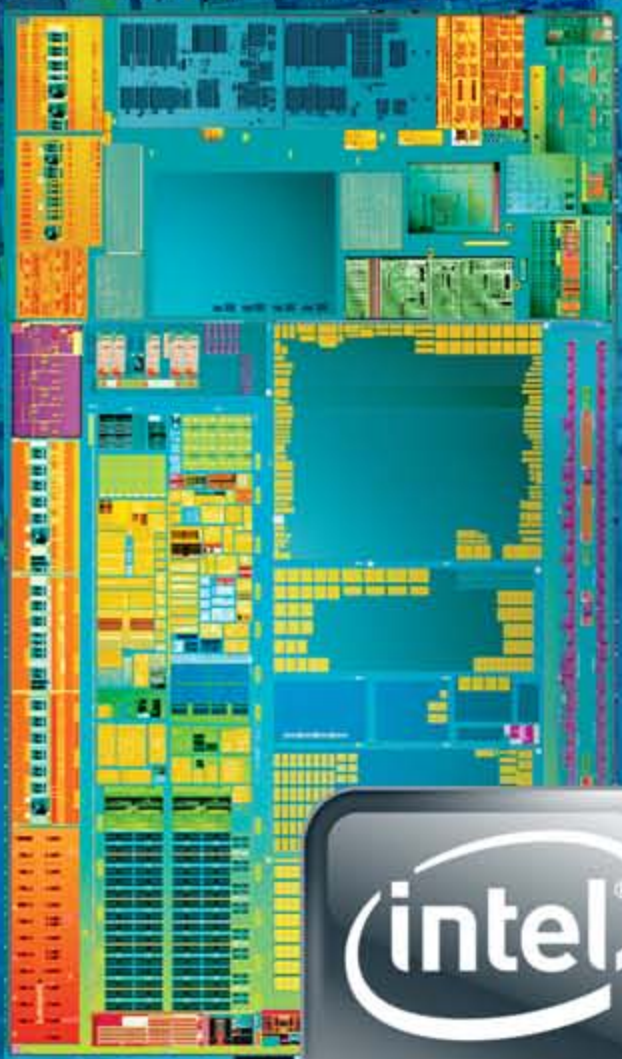
Sources: NMP data taken from ABI, Futursource, In-Stat/DTV data taken from iSuppli, Display Search



Intel: Delivering a Smart TV Solution



Intel® Atom™ Processor
Codename: Tunnel Creek



IA Solutions for Embedded



Not Actual Die Size



Intel® Atom™ – Embedded Opportunities Everywhere



>3,000 Design Engagements

- Biometrics Finger Print Reader
- Point of Sale
- Digital Weight Scale
- ATM
- Hotel Concierge System
- Handheld Barcode Reader
- Handheld Wireless Spectrum Tester
- Handheld Ultrasound
- Hospital Bedside Terminal
- Voting Machine
- Lottery Machine
- Network Security Appliance
- VoIP PBX
- Test and Measurement Appliance
- Education Terminal
- Communications Gateway
- Programmable Logic Controller
- Computer Numeric Controllers
- Industrial HMI Panel
- Industrial PC
- Avionics System
- Wearable PC
- Connected Soldier Device
- Military Soldier Training Device

Digital Signage: Transforming Advertising

Entry

Lowest Power
Limited Content Blending



Winmate, Taipei City Zoo

Mainstream

Performance for Analytics Remote
Manageability Robust Content Blending



Aopen, Taiwan Carrefour Retail

High End

Highest Performance Remote
Manageability Richest Content
Blending Large Multi-Display



C-Nario, Shanghai Airport

Harnessing the Full Power of the Continuum



Intel® Atom™ Processor Z-Series



IA Solutions for Handhelds



Not Actual Die Size



Intel® Atom™ Processor Z6xx Series

Making Smartphones Even Smarter...



Range of Form Factors

*Smartphones
That Fit In
Your Shirt Pocket*



Uninterrupted Battery Life

*>10 Days Standby
>2 Days Music
>5 Hours Video*



Fast and Responsive

*Multi-tasking
Multi-windowing*



Amazing Visual Experience

*1080p HD Video Playback
3D Graphics and Gaming*

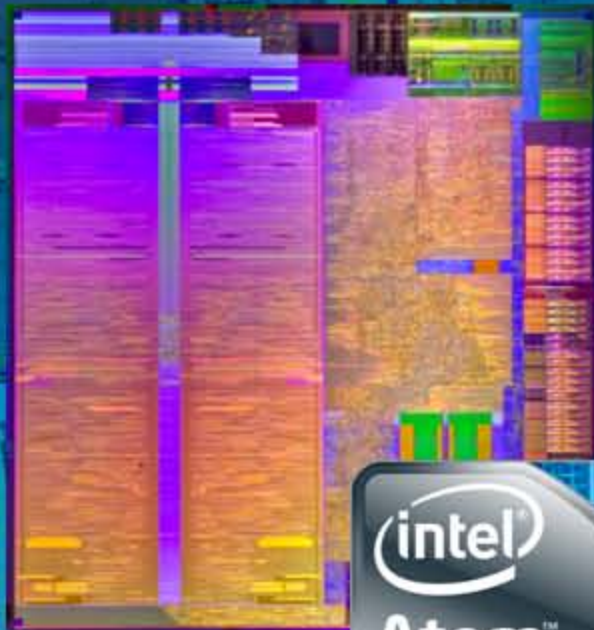


Full Internet Experience

*PC-like Internet
Rich and Interactive*



Intel® Atom™
Processor



IA Solutions for Tablets and Sleek Netbooks

Intel Atom
Processor N455
and N475

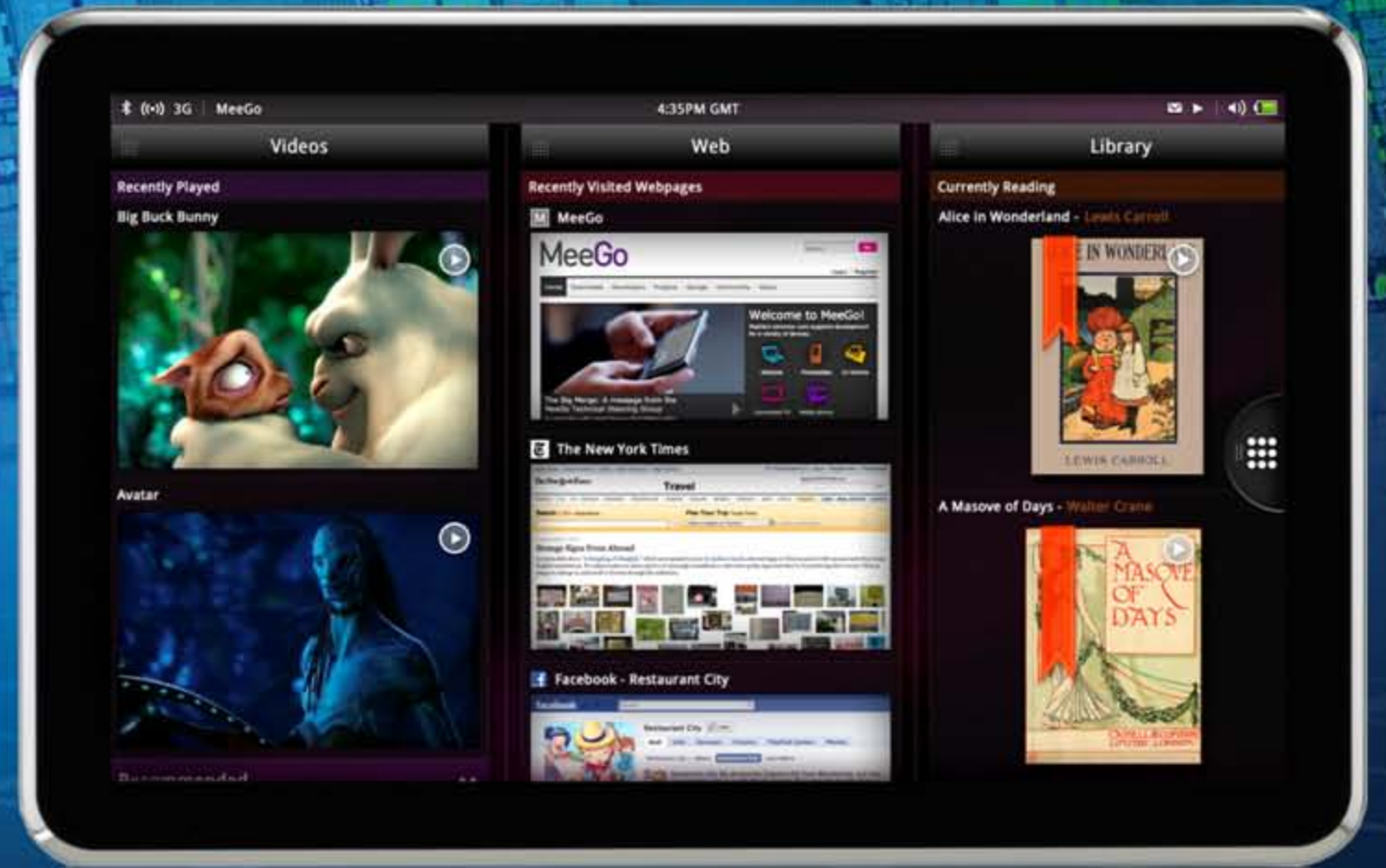


Not Actual Die Size



IA Tablet Platform of Choice

- Performance Leadership
- OS Port of Choice
- Open SW Ecosystem
- Rich internet Support



Introducing Oak Trail

OS Port of Choice



MeeGo™

Google

Rich Media & Graphics

Up to 1080p video
decode² & HDMI



HDMI™
HIGH-DEFINITION MULTIMEDIA INTERFACE

Thinner & Innovative Form Factors

Passive cooling
<20mm netbooks
<15mm tablets



Longer Battery Life

50% lower silicon
power than Pine Trail
Integration of HD
video decode & HDMI



1: Support for Chrome OS under evaluation. 2: Playback performance may vary based on display resolution.
3: Based on 3DMark06, pre-si estimate. 4: Refer to slide 9 for details.
4: + Pre-silicon estimate, based on 10.2" display, Win 7, 35Whr battery, power optimized configuration.

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

Gianfranco Lanci
CEO and President
Acer Inc.

acer



Summary

The Compute Continuum Will Fuel the Next 30 Years of Innovation

1 Million PC/Day is An Impressive Feat but We Can Do Much Better!

Intel® Atom™ is Everywhere

But Before I Wrap, There is One More Thing...





Compute Continuum

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 tax rate expectation is based on current tax law and current expected income. The tax rate may be affected by the jurisdictions in which profits are determined to be earned and taxed; changes in the estimates of credits, benefits and deductions; the resolution of issues arising from tax audits with various tax authorities, including payment of interest and penalties; and the ability to realize deferred tax assets. Gains or losses from equity securities and interest and other could vary from expectations depending on gains or losses realized on the sale or exchange of securities; gains or losses from equity method investments; impairment charges related to debt securities as well as equity and other investments; interest rates; cash balances; and changes in fair value of derivative instruments. 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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