Sean M. Maloney
Executive Vice President
Sales & Marketing Group
1B Intel-based DT MBs Manufactured in Taiwan

Thanks a Billion
Agenda

1 Billion Down, 1 Billion To Go

Accelerate The Mobile Momentum

Fixing The Digital Divide
How Did Taiwan Do It?

• Unmatched sense of urgency
• Cost focus built into DNA
• Constant drive for Innovation
• Constant ambition for Growth
How Did Taiwan Do It?

- Unmatched sense of urgency
- Cost focus built into DNA
- Innovate for Growth
  - Constant drive for Innovation
- Constant ambition for Growth
Fallacy: The DT Is Dead

Reality: Innovation Will Drive Growth In DT
Next Billion: Drive the Transitions

1. All-in-one PCs
2. HDMI
3. Nehalem
4. Windows* 7
Cumulative HDMI-Enabled Devices Shipped

Billions

Source: Instat
Nehalem Transition Underway
Intel® 5 Series Chipsets

- Breakthrough performance in mainstream segments
- Ultimate flexibility
  - Up to 8 threads via Intel® Hyper-threading technology
  - Intel® Turbo Boost technology
  - Dual graphics support
- Integrated memory controller
- Dynamic power management
36 P55-based MBs, and 26 X58-based MBs

Thank You For Your Nehalem Enablement
Windows* 7 Transition Next!

**Consumer**
- Faster and More Reliable
  - Wireless Setup
  - HomeGroup
  - Windows Touch
- DirectX 11
  - 64-bit Computing Support
- Windows Media Center
  - Internet TV
  - Remote Media Streaming
  - PlayTo and Photo Gallery

**Business**
- Wireless Setup
- Location Aware Printing
- Battery Life
- Advanced Backup
- Windows XP Mode

**Simplify My Life**
- Power Gaming
- More Media, More Places
- Work From Anywhere
- Safeguard Your Work

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

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Accelerate The Mobile Momentum

Fixing The Digital Divide
Tick Tock: Predictable Development
Reduced Risk, Faster TTM

2009: 2nd Generation
High-k + Metal Gate

Intel® Core™
Nehalem microarchitecture
Future uArch

Merom
Penryn
Nehalem
Westmere
Sandy Bridge

NEW Process 45nm
NEW Process 32nm
NEW Microarchitecture 45nm
NEW Microarchitecture 32nm

TOCK
TICK
TOCK
TICK
TOCK

All dates, product descriptions, availability, and plans are forecasts and subject to change without notice.
Mobile PC Segment is Far From Saturation

US Consumer Electronics Retail Sales (Mar’09 vs Mar’08)

- **Growth (0%+):** Notebooks, Netbooks, LCD TVs
- **Soft (-10% to 0%):** Cell Phones
- **Decline (-20% to -10%):** Home Theater, Ink Jet, Laser Printers

**Installed Base / Subscribers (Billion Units):**

- **World Mobile PCs Base 1998-2012**
- **World Mobile Phone Ramp**

Source: IDC, NPD, Intel
Extending Mobile Leadership

Intel® Centrino® 2 Processor Technology Gets Even Better!

- Unrivaled Performance & Battery Life
- New Ultra-Thin Laptops For the Consumer
- Improved Visual Quality and Media
- Expanded Wireless & Ecosystem
Delivering Real Value for Consumers
Significant Performance Improvement on Everyday Applications

1.5X Better
iTunes* MP3 Encoding

2.6X Better
Sony* Vegas* Video Encoding

1.6X Better
Adobe* Photoshop* Elements
Announcing Today:
Ultra-Thin Comes to the Mainstream!

From 3342 mm² to = 1415 mm²
Ultra-Thin Family: In Every Segment and Price Point

- **Best**: Best Media Experience
- **Better**: Great Media Experience
- **Good**: Mainstream System Performance
- **Entry**: Entry Level System Performance
Security & Manageability: Increasing Challenges

Growing Security Threats

Increasing Manageability Costs

11% Innovation
89% Maintenance

Source: Symantec Internet Security Threat Report Volume XIV, April 2009
Intel® Centrino® 2 with vPro™ Technology

Proactive Security & Built-in Manageability

Improved Wireless Manageability
Even When Notebook Is Asleep!

Secure IT Access
Even Outside the Business Network!
A New Era of Mobile Security

Intel® Anti-Theft Technology

Hardware Based Security To Help Track, Recover and Disable Lost Laptop

*Other brands and names are the property of their respective owners.*
Next Revolution in Mobile Computing: Calpella

Montevina

Penryn Processor

PCIe Graphics
Display
Clocks

FSB

Cantiga

GFX
IMC
ME
DDR2 / DDR3

DMI

ICH9M

I/O

NVM

Calpella

Nehalem Processor

PCIe* Graphics

GFX
IMC

DDR3

intel® Flexible Display Interface

PCH

Display

NVM

Clock Buffer

I/O
Agenda

1 Billion Down, 1 Billion To Go

Accelerate The Mobile Momentum

Fixing The Digital Divide
The Digital Divide

5 BILLION PEOPLE

Source: Internet World Stats
The Digital Divide

DROPOUTS COST
U.S. $329 BILLION
A YEAR

Source: Alliance for Excellent Education and Silent Epidemic, Org
The Digital Divide

STUDENTS WITH NOTEBOOKS SCORED HIGHER THAN 85% OF THEIR PEERS

Source: Apple Classroom of Tomorrow and National School Board Association
The Digital Divide

INTERNET USERS MAKE $1.40 MORE AN HOUR

Source: Make Money Surfing the Web: The Impact of Internet Use on the Earnings of U.S. Workers. Paul DiMagio and Bart Bonikowski. Department of Sociology, Princeton University
The Digital Divide

5 BILLION PEOPLE

Connectivity  Cost

Source: Internet World Stats
WiMAX Around the World
450+ Fixed and Mobile Deployments In Over 135 Countries

800M Population Covered by 2010
Intel® Atom™ Processor: Celebrating 1st Birthday

Computex ’08

LAUNCHED
INTEL® ATOM™ PROCESSOR
FOR NETBOOKS
AND NETTOPS

Computex ’09

ATOM 1st BIRTHDAY
>75 NETBOOK DESIGNS
ESTABLISHED AROUND
THE WORLD
Nettops, A New Solution for the Digital Divide

*Embedded WiMAX*
Affordable Computing Hardware

AJAI CHOWDHRY
Founder - HCL
Chairman & CEO - HCL Infosystems

HCL
Strong Industry Momentum On Netbooks

Cumulative Netbook Shipments Since Introduction
Tens of Millions of Units Shipped

*Other brands and names are the property of their respective owners.*
New Features for Netbooks
Moblin 2.0 on Atom™ Delivers Great Value

*Other brands and names are the property of their respective owners.
Pine Trail-M: Next Level of Netbook Performance

Lower Platform BOM & Easier Design
Reduced Power
Improved Performance

More Details/Demo On Mooly Eden’s Press Event at 3:30pm
Opportunity to increase PC penetration in the youth segment
- 1.95M established and 1.8B emerging kids, tweens, and teens in 2010
- Low PC attach to youth (est 20% in mature, <3% in emerging)
- Establish leadership and seed the next generation of tech adopters
潘瑋柏

潘瑋柏第七張專輯『零零七』5/22正式發行！

潘瑋柏 will P@N 第七張全新專輯『零零七』
Summary: Innovation and Growth

One Billion Down, Now Next Billion

Notebook: Ultra-thin Is In!

Netbook: Third Generation Ramps

Digital Divide: Nettops and WiMAX Arrive

Every Kid Deserves a PC