



STATE OF 5G

A TECH VIEWPOINT

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RISK FACTORS

Statements in this presentation that refer to future plans and expectations are forward-looking statements that involve a number of risks and uncertainties. Words such as "anticipates," "expects," "intends," "goals," "plans," "believes," "seeks," "estimates," "continues," "may," "will," "would," "should," "could," and variations of such words and similar expressions are intended to identify such forward looking statements. Statements that refer to or are based on estimates, forecasts, projections, uncertain events or assumptions, including statements relating to total addressable market (TAM) or market opportunity, future products and technology and the expected availability and benefits of such products and technology, and anticipated trends in our businesses or the markets relevant to them, also identify forward-looking statements. Such statements involve many risks and uncertainties that could cause actual results to differ materially from those expressed or implied in these forward-looking statements. Important factors that could cause actual results to differ materially from the company's expectations are set in Intel's earnings release dated October 24, 2019, which is included as an exhibit to Intel's Form 8-K furnished to the SEC on such date. Additional information regarding these and other factors that could affect Intel's results is included in Intel's SEC filings, including the company's most recent reports on Forms 10-K and 10-Q. Copies of Intel's Form 10-K, 10-Q and 8-K reports may be obtained by visiting our Investor Relations website at www.intc.com or the SEC's website at www.sec.gov. Intel does not undertake, and expressly disclaims any duty, to update any statement made in this presentation, whether as a result of new information, new developments or otherwise, except to the extent that disclosure may be required by law.



INDUSTRY MEGA-TRENDS

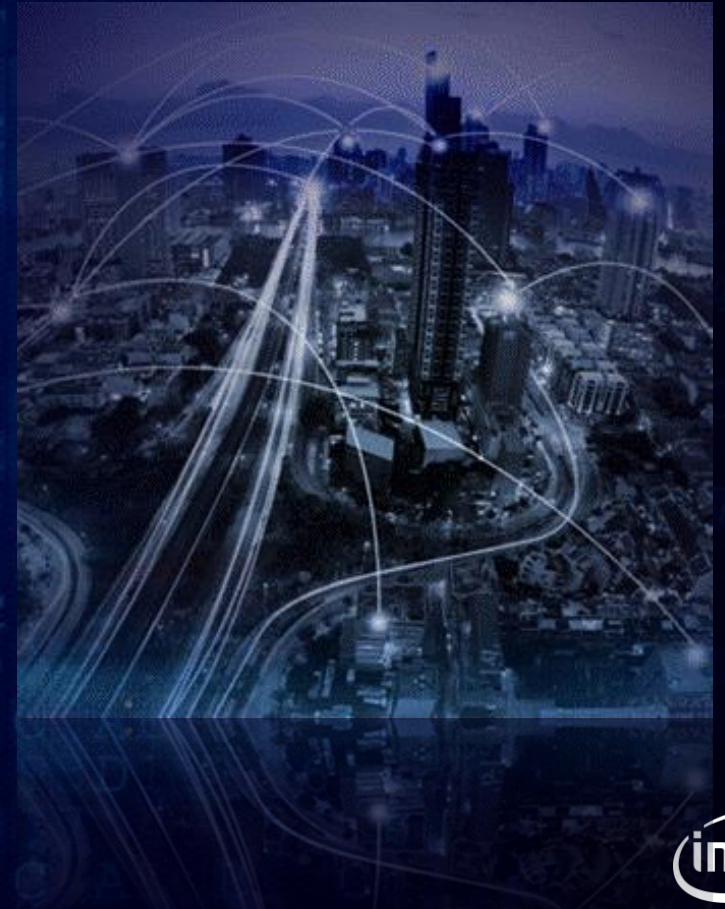
PROLIFERATION OF
Cloud Computing



GROWTH OF
Artificial Intelligence



CLOUDIFICATION OF THE
Network and Edge



INTEL'S NETWORK TRANSFORMATION STRATEGY

DEVICES | THINGS

IOT THINGS& DEVICES,
ROUTING, UCPE,
NETWORK SECURITY

ACCESS | EDGE

WIRELESS ACCESS (RAN, VRAN),
VCCAP, VEPC, VBNG

CORE

IMS, VEPC, GILAN

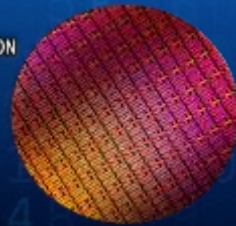
DATA CENTER | CLOUD

IMS, VEPC, GILAN



WORKLOAD CONVERGENCE

Intel® architecture
Performance + scale



NETWORK FUNCTION VIRTUALIZATION

Cloudification of the network



CUSTOMER & INDUSTRY COLLABORATION

Win together

INTEL® NETWORK BUILDERS



NETWORK TRANSFORMATION IS HAPPENING FROM EDGE TO CORE



5G ACCELERATES NETWORK TRANSFORMATION

NEXT GENERATION OF WIRELESS NETWORKS

HIGHER SPEEDS, GREATER CAPACITY AND LOWER LATENCY

BILLIONS OF CONNECTED DEVICES AND THINGS

2G

CELLULAR COMMS



3G

DATA AND THE
APP REVOLUTION



4G

FASTER DATA &
MORE USERS

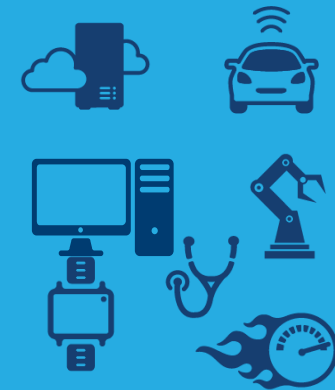


5G

ENHANCED
MOBILE
BROADBAND

ULTRA-
RELIABLE
AND LOW
LATENCY

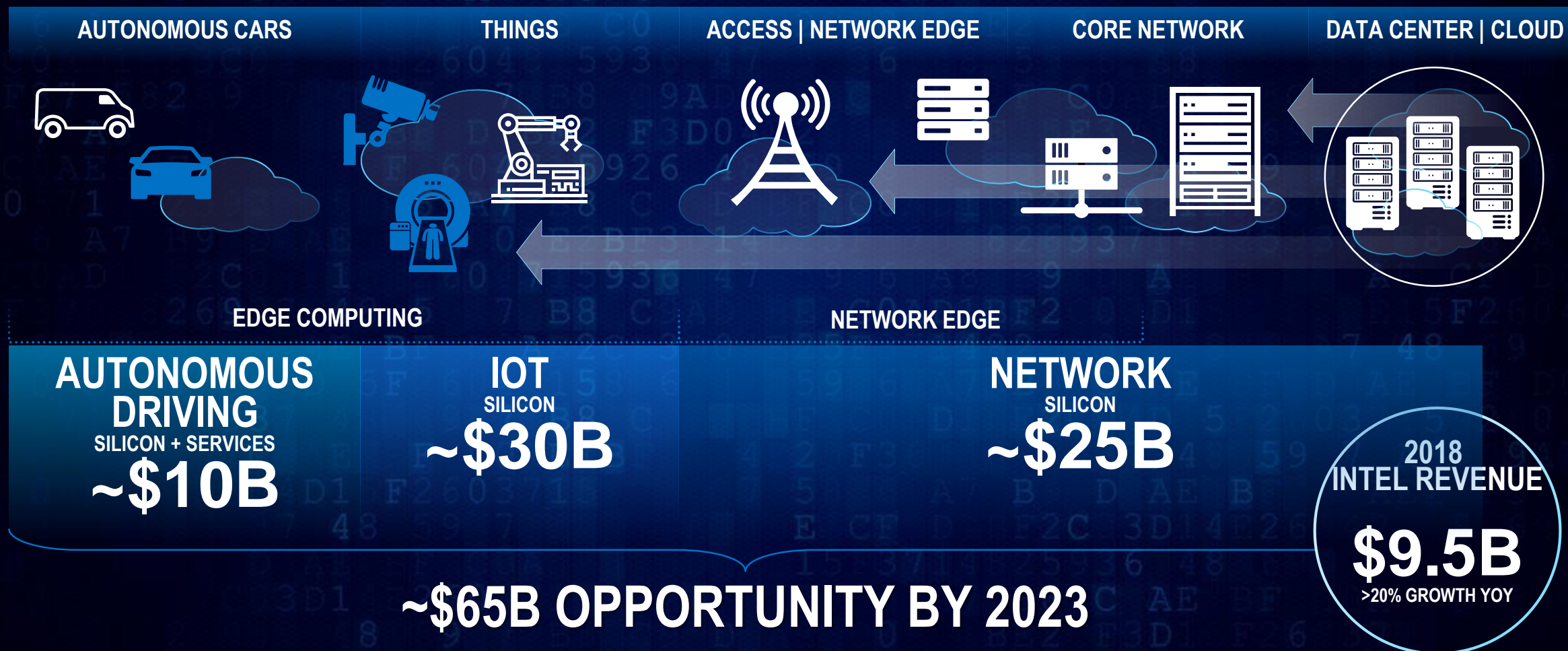
MASSIVE MACHINE-
TO-MACHINE



AGILITY, SCALABILITY AND INTELLIGENCE THROUGHOUT THE NETWORK. INTEL IS LEADING 5G

NETWORK + EDGE COMPUTING

ACCELERATED BY 5G



Source: Amalgamation of analyst data and Intel analysis. 2018 revenue based on a portion of DCG, PSG, IOTG and Mobileye.



INTEL'S TECHNOLOGY FOR NETWORK & EDGE

IOT EDGE

ON PREM EDGE

FAR EDGE

CORE

DATA CENTER | CLOUD



ACCELERATORS

MEMORY

INTEL OPTANE DC
PERSISTENT MEMORY



CONNECTIVITY

INTEL ETHERNET
CONTROLLER



INTEL SILICON
PHOTONICS



SOFTWARE

OpenVINO
OPENNESS



BRINGING 5G TO LIFE TOGETHER

INVEST

OPEN SOURCE AND STANDARDS



INDUSTRY COLLABORATION

INTEL® NETWORK BUILDERS &
INTEL® DEVELOPER ZONE

350+

Members

35+

Comms SPs

100+

POCs/Trials/Deployments
Based on Member Solutions

13,000+

Developer's Trained
worldwide

12,000+

Network Builder
University Program
Members

50+

Network Edge
Ecosystem Program
Members

251,480+

IDZ page views

ACCELERATING TIME TO MARKET



NFVI

NETWORK FUNCTIONS
VIRTUALIZATION
INFRASTRUCTURE



UCPE

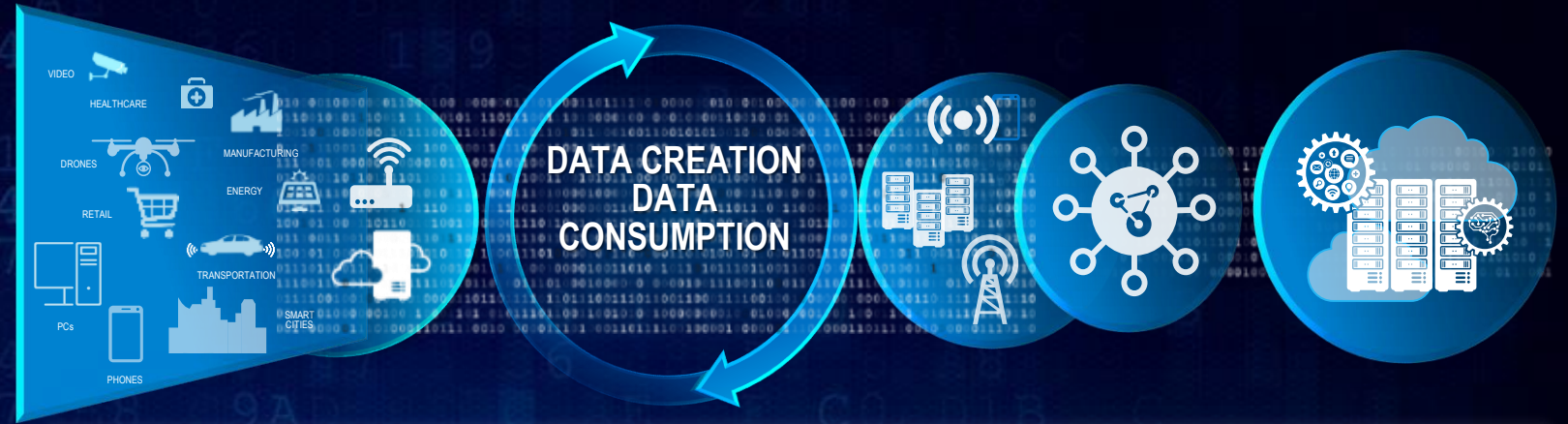
UNIVERSAL CUSTOMER
PREMISES EQUIPMENT

REFERENCE
ARCHITECTURES:
NGCO, CORE,
COMON PLATFORMS

**INDUSTRY LEADING ECOSYSTEM PROGRAMS
DRIVE 5G & EDGE TRANSFORMATION & ENABLE DEVELOPERS**



5G END-TO-END



DEVICES /
THINGS

EDGE
COMPUTE
NODE

NETWORK HUB OR
REGIONAL DATA CENTER

CORE
NETWORK

CLOUD
DATA CENTER

TECHNOLOGY TRANSFORMATION

- Performance of data center to the edge
- Agile, virtualized, software defined infrastructure
- Open source Software and standards

BUSINESS TRANSFORMATION

- Ecosystem dependencies
- Partnerships / consortiums
- New business model opportunities



SMART EDUCATION



WAREHOUSE & MANUFACTURING



SMART CITY



CONNECTED CAR



RETAIL



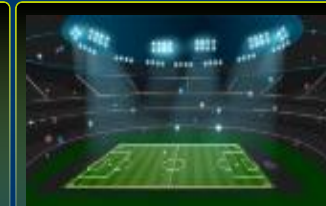
TRANSPORTATION



EDGE CLOUD GAMING



INSPECTION & INFRASTRUCTURE



SMART STADIUMS



VR/AR WITH LOCATION

Bandwidth

Content Control

Low Latency

Security

Privacy

Reliability

THE NEXT GENERATION OF NETWORKS IS HERE



Rakuten WORLD'S 1ST END TO END CLOUD NATIVE MOBILE NETWORK

100%	35%	4 SKUS	~1/10TH	~1 YEAR	5G READY
ON INTEL ARCHITECTURE	IMPROVED TCO	FOR ENTIRE NETWORK	OPERATIONS STAFF	FROM CONCEPT TO DEPLOYMENT	NETWORK ARCHITECTURE

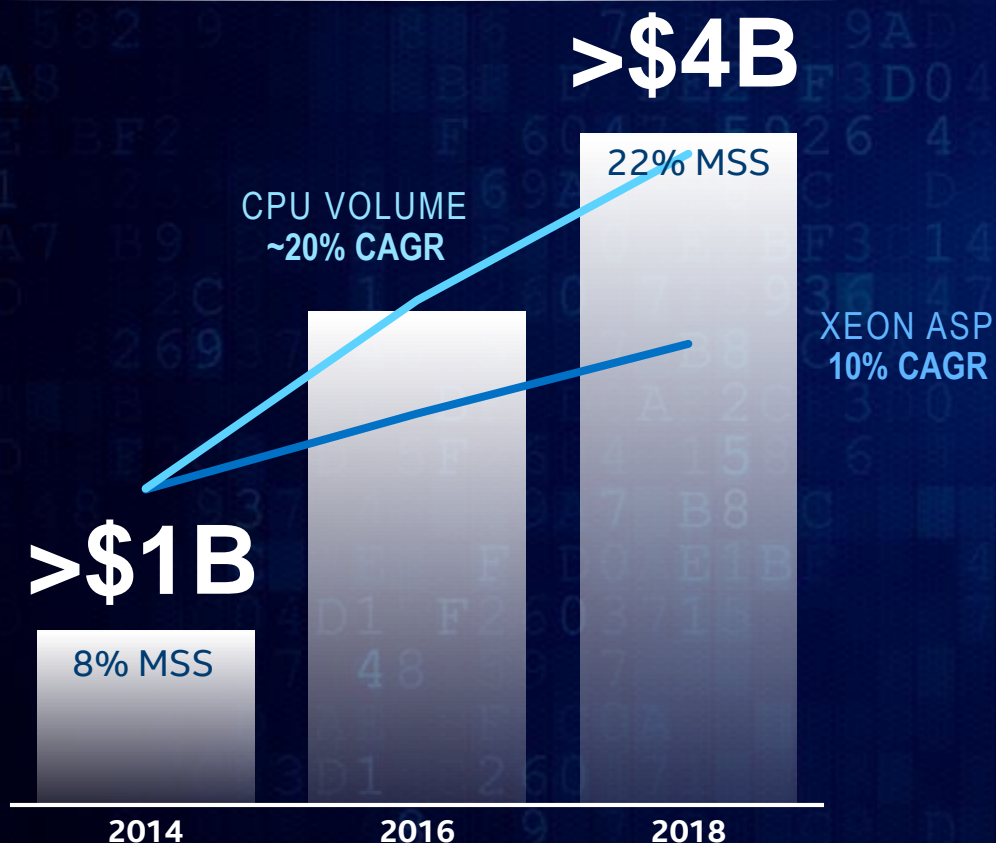
“Our vision is to build a network that innovates at the speed of software and scales at the speed of cloud... leveraging best-in-class technology...to provide a high quality, cost-effective service to our customers.”

Tareq Amin, Group CTIO, Rakuten

NETWORK & EDGE GROWTH

ACCELERATED BY 5G

INTEL NETWORK REVENUE
~40% CAGR



AREAS OF FOCUS

DRIVING TRANSFORMATION TO
CLOUD-BASED PLATFORMS

DELIVERING PORTFOLIO OF PRODUCTS FOR
5G AND EDGE

ON TRACK TO BASESTATION MSS
>40% BY 2022

SUMMARY

5G IS NOT JUST ABOUT CONNECTIVITY

It is the innovation platform of tomorrow for enterprise

THE NETWORK INFRASTRUCTURE MARKET IS TRANSFORMING

CoSPs are looking to benefit from the same cloud economics as the CSPs

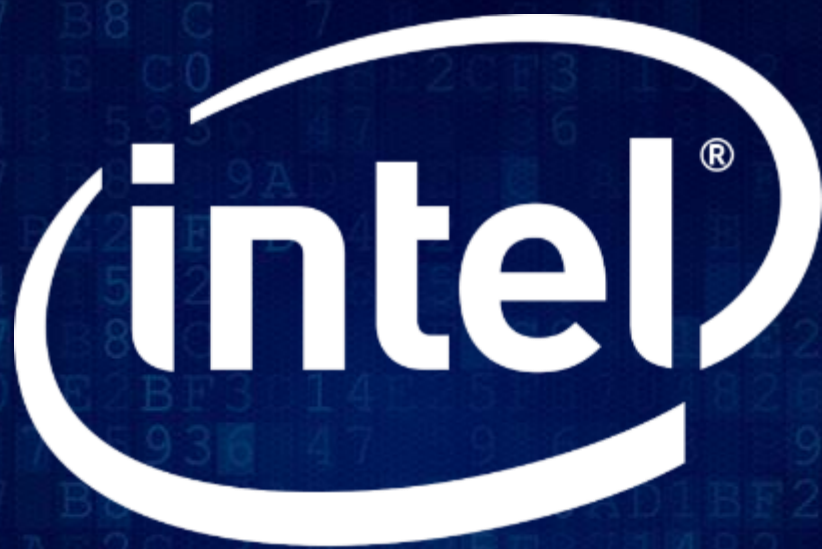
EDGE COMPUTE CREATES A SIGNIFICANT OPPORTUNITY

It is the next frontier for CoSP, CSP and web-scale companies

INTEL HAS AN UNPARALLELED ARRAY OF ASSETS TO FUEL 5G GROWTH

Portfolio of leadership products to move, store and process data





experience
what's inside™