Wireless Communications and Computing Group Update

Ron Smith :: Senior Vice President and General Manager
Wireless Communications and Computing Group

2003 Intel Spring Analyst Meeting

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Strategy

Win the handset architecture and products as they go through convergence of communications and computing

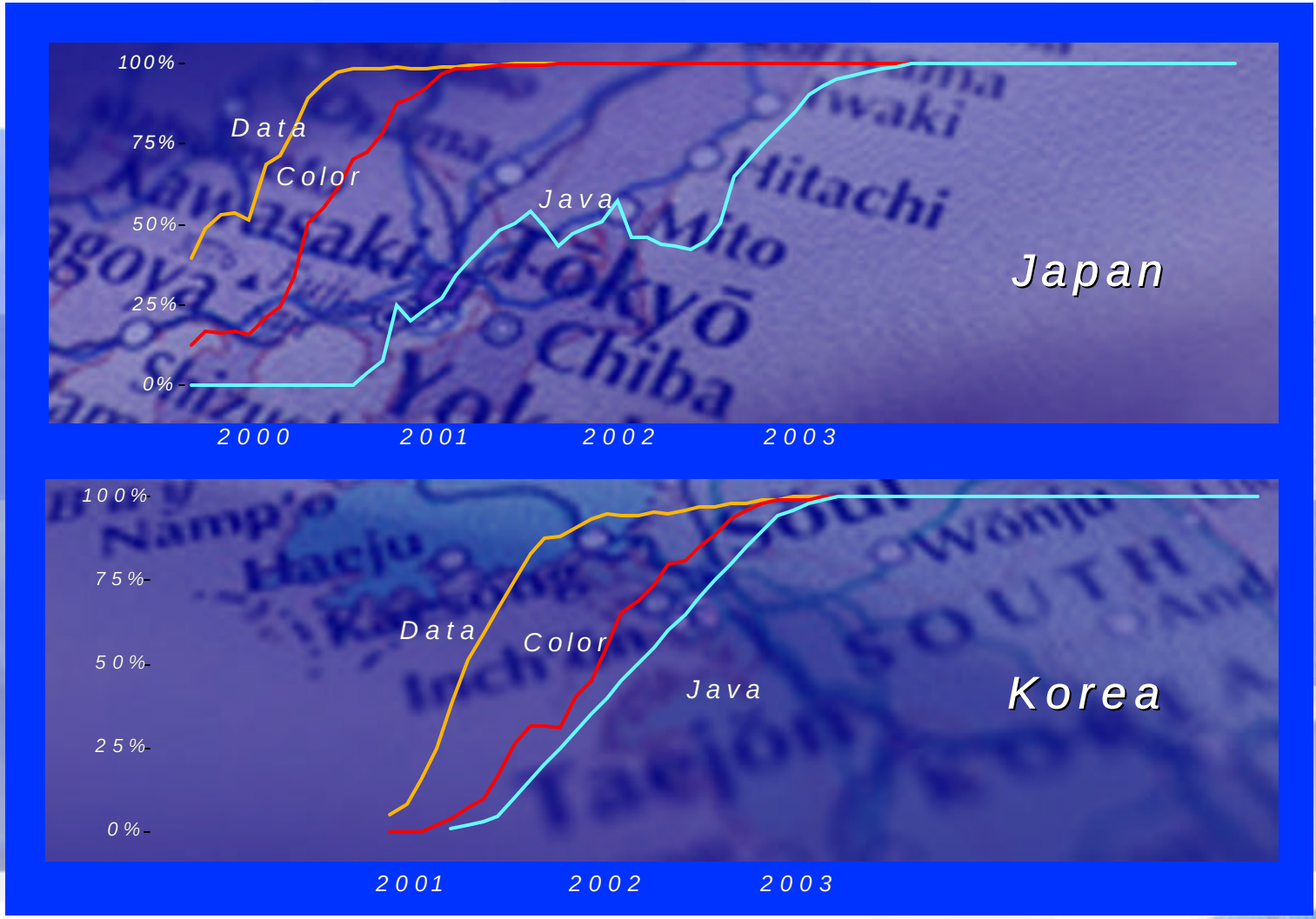
Agenda

Environment

Products, Progress and Plans

Data Coming to Cell Phones

Adoption Rates



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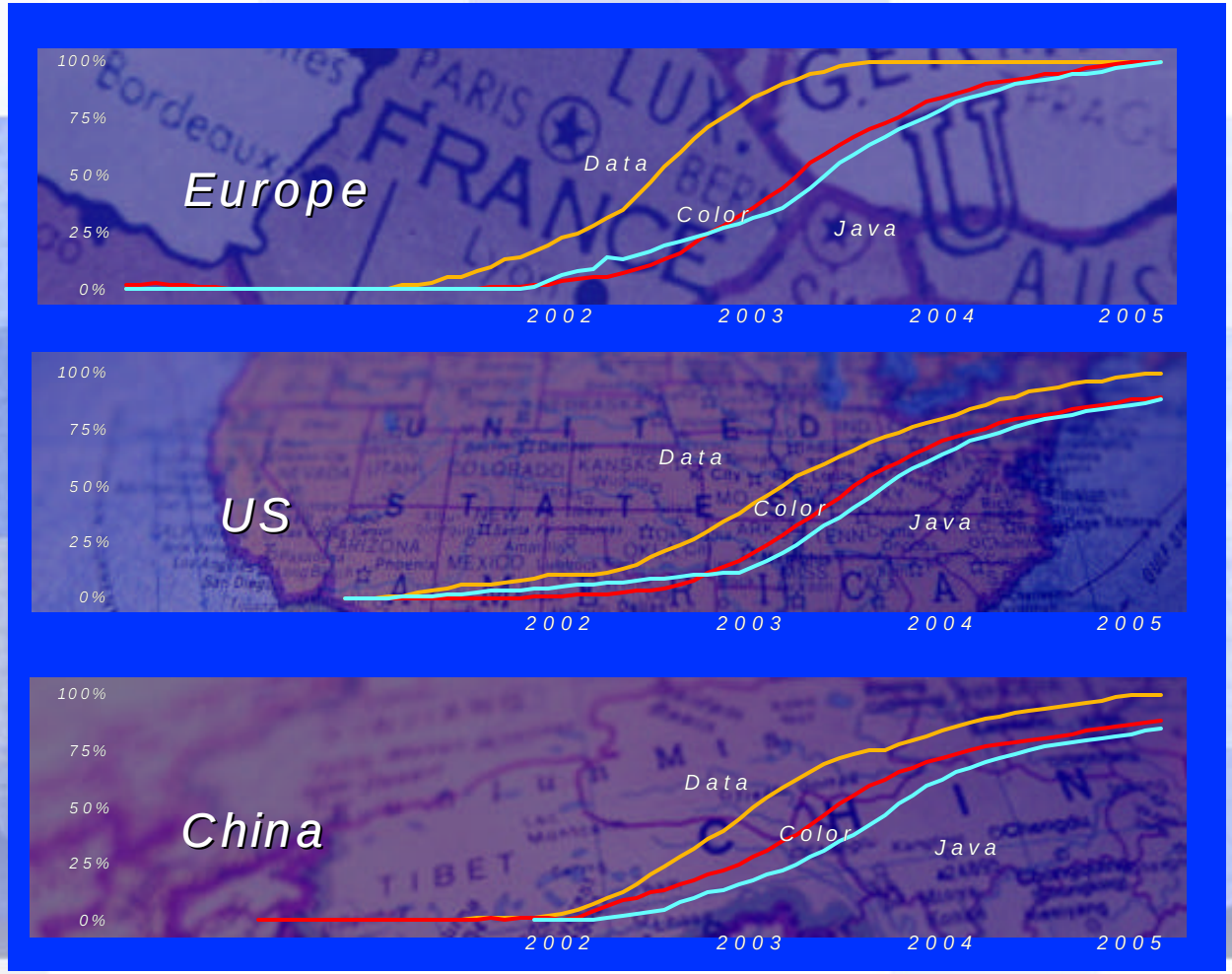
Technology Leadership

And it is Worldwide

Adoption Rates



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Growth of Data Cell Phones

Cell Phone Sales

20 (5%) Application Phone Sales 497 (72%)

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Technology Leadership

Strategy

Leading Cores

Integration

Full Solution

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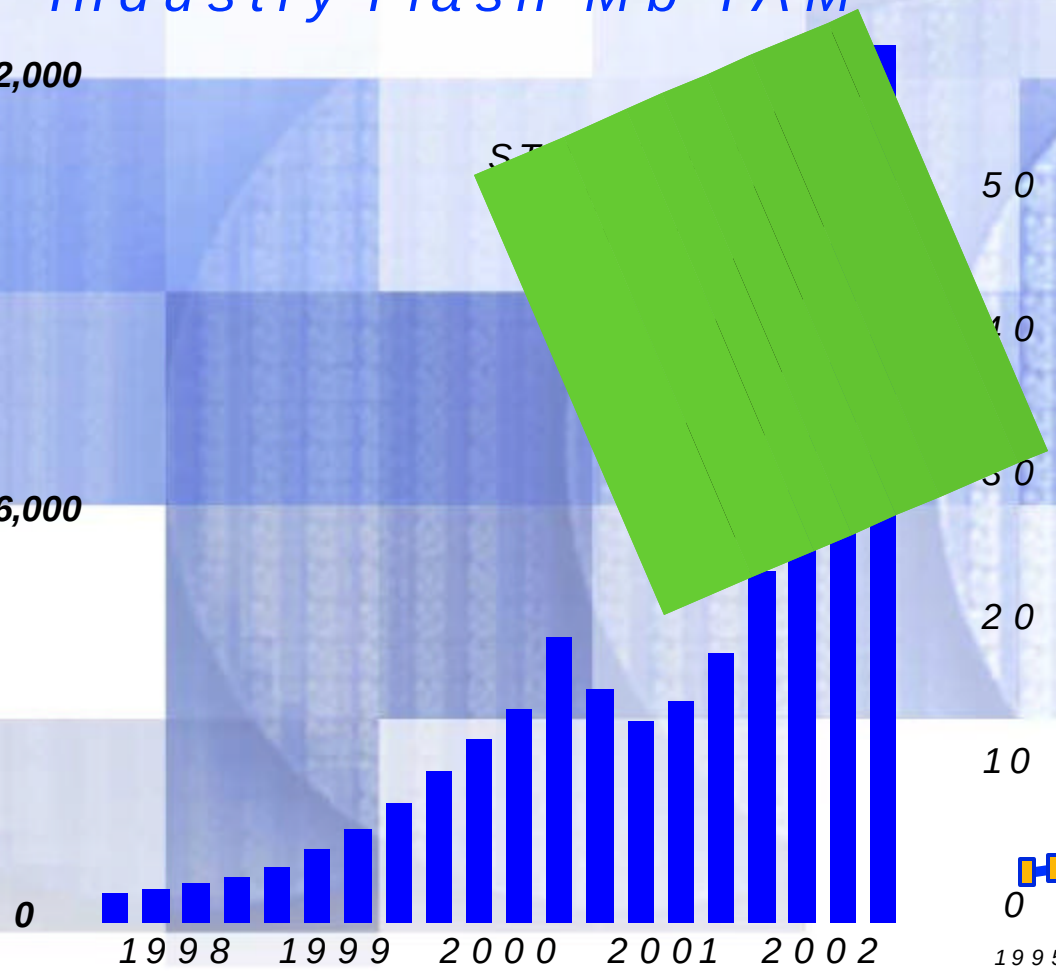
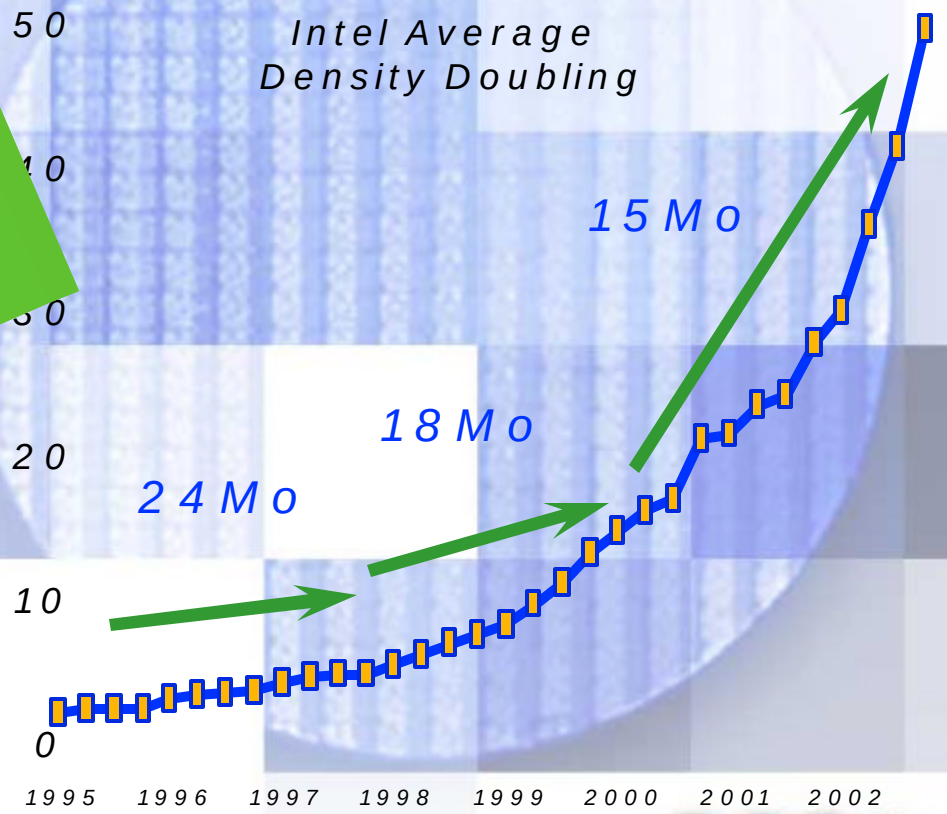
Flash Mbits Accelerating

Industry Flash Mb TAM



Intel Flash Shipments



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Last Quarter

Q1'03 sales down

Seasonality

Migration to new products

Pricing

Doing what is needed to maintain and win new business

Already signed multiple new Flash agreements

Winning back business on new products

Extending Our Leadership

Growing through leading products and manufacturing technology

Extend lead in higher density Flash solutions

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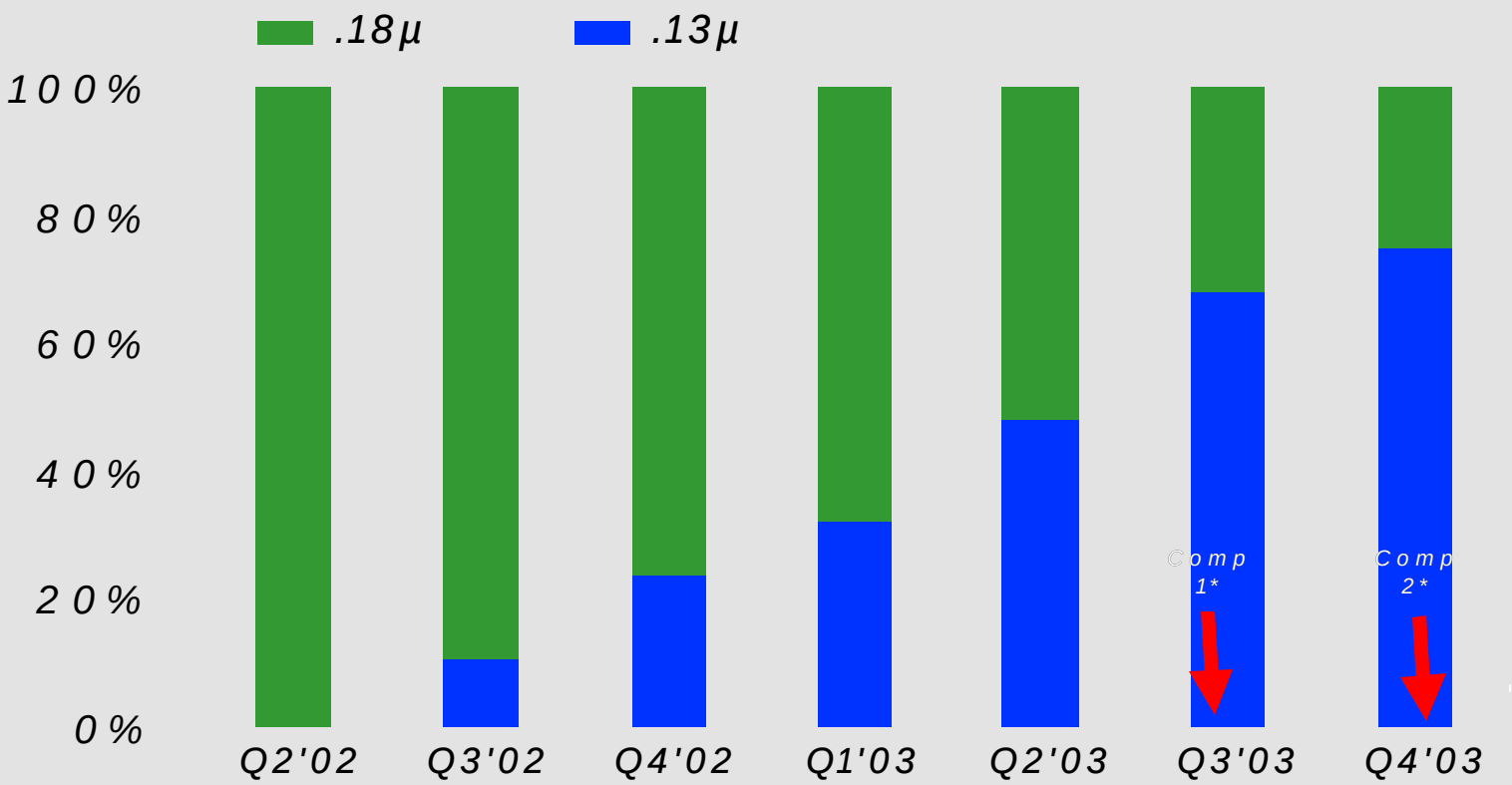
Flash Leadership



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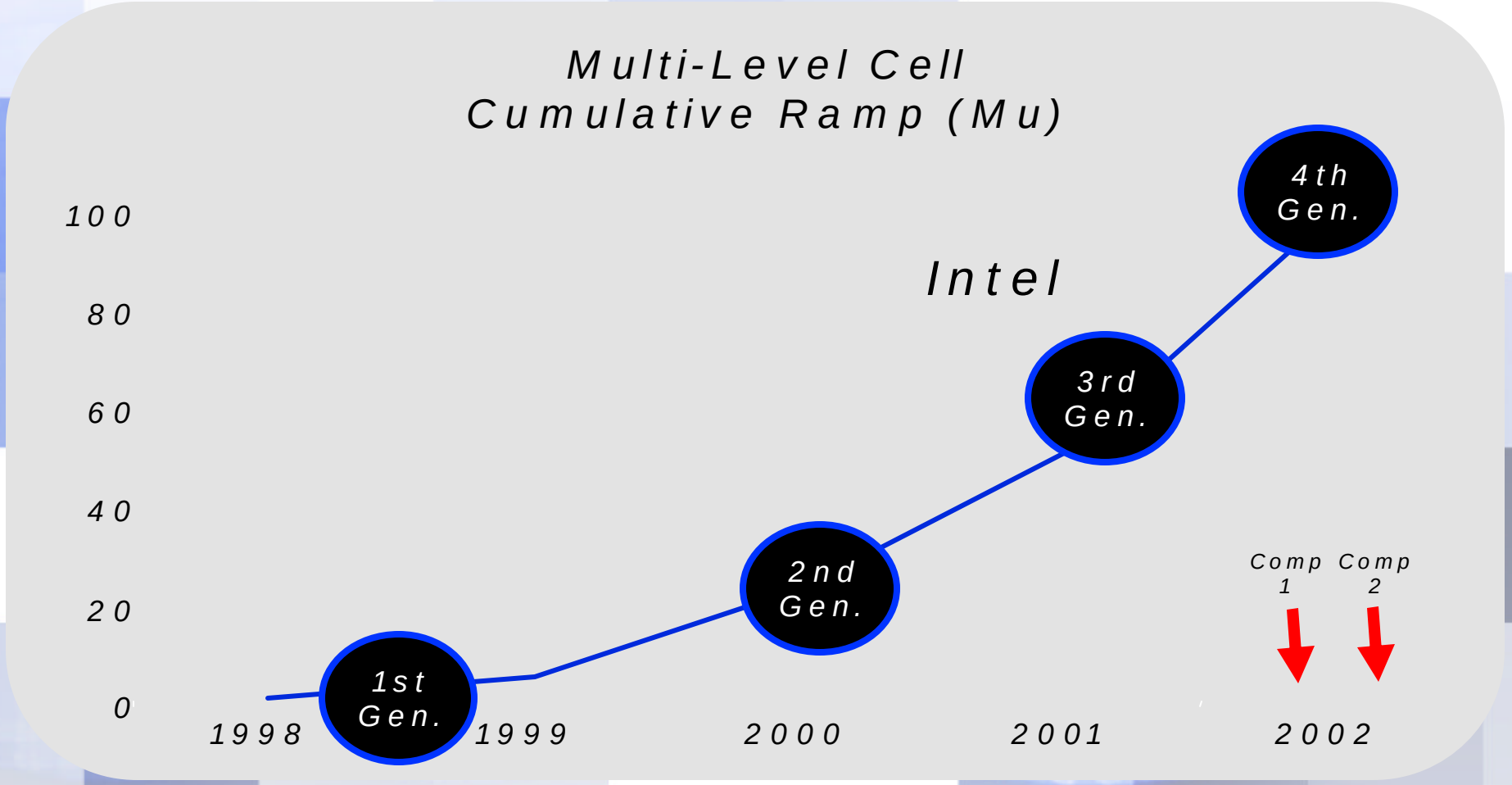
Flash Leadership



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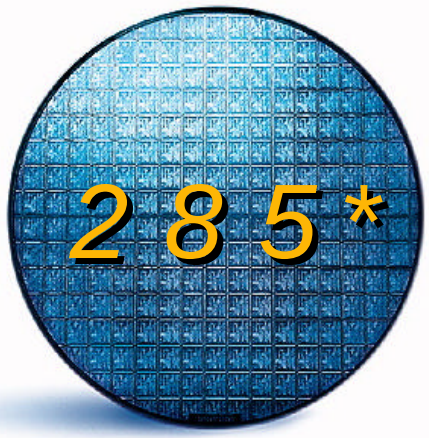
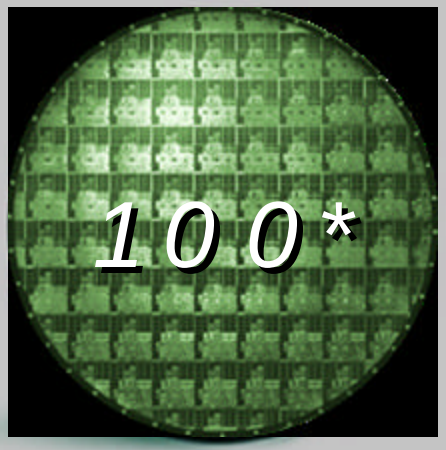
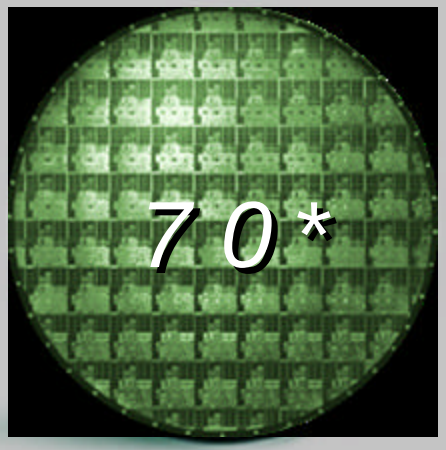
One Generation Ahead



Intel
2 bits/cell
0.13µ



Competitor
2 bit per cell
.23µ



Competitor
1 bit per cell
.18µ

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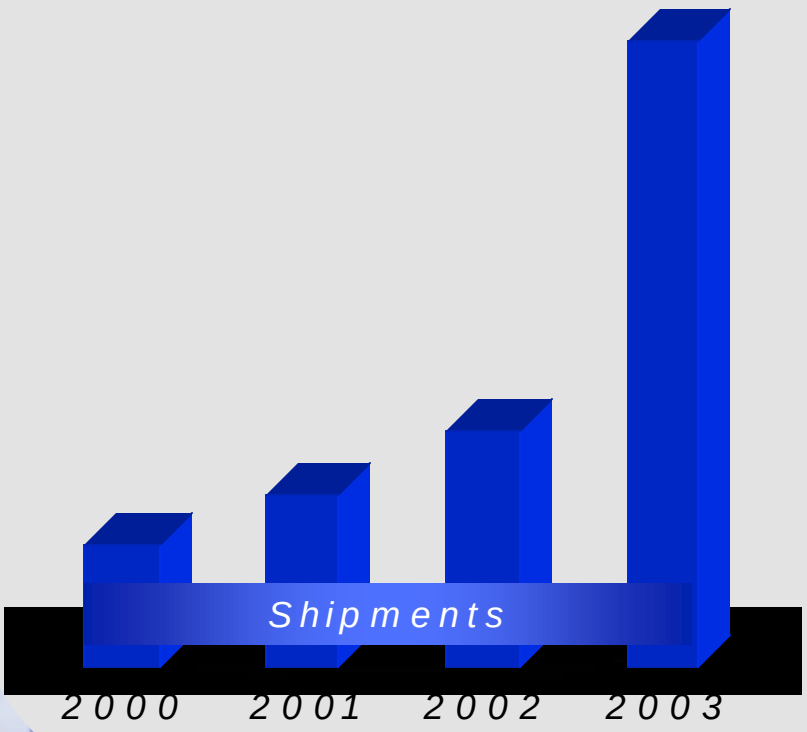
Technology Leadership

*Relative Die/Wafer - Based on 128Mb density with Wireless features

Applications Processor

Intel® XScale™ Microarchitecture Processors

Intel Apps Processor Shipments



Power / Performance leader

Microprocessor Report Analysts' Choice Award

PDA Momentum

1 Pocket PC, #1 Linux,

Won Palm

Intel's Total PDA Market Segment*

0% MSS 2000

25% end of 2002

35% end of Q1'03

*Source: IDC

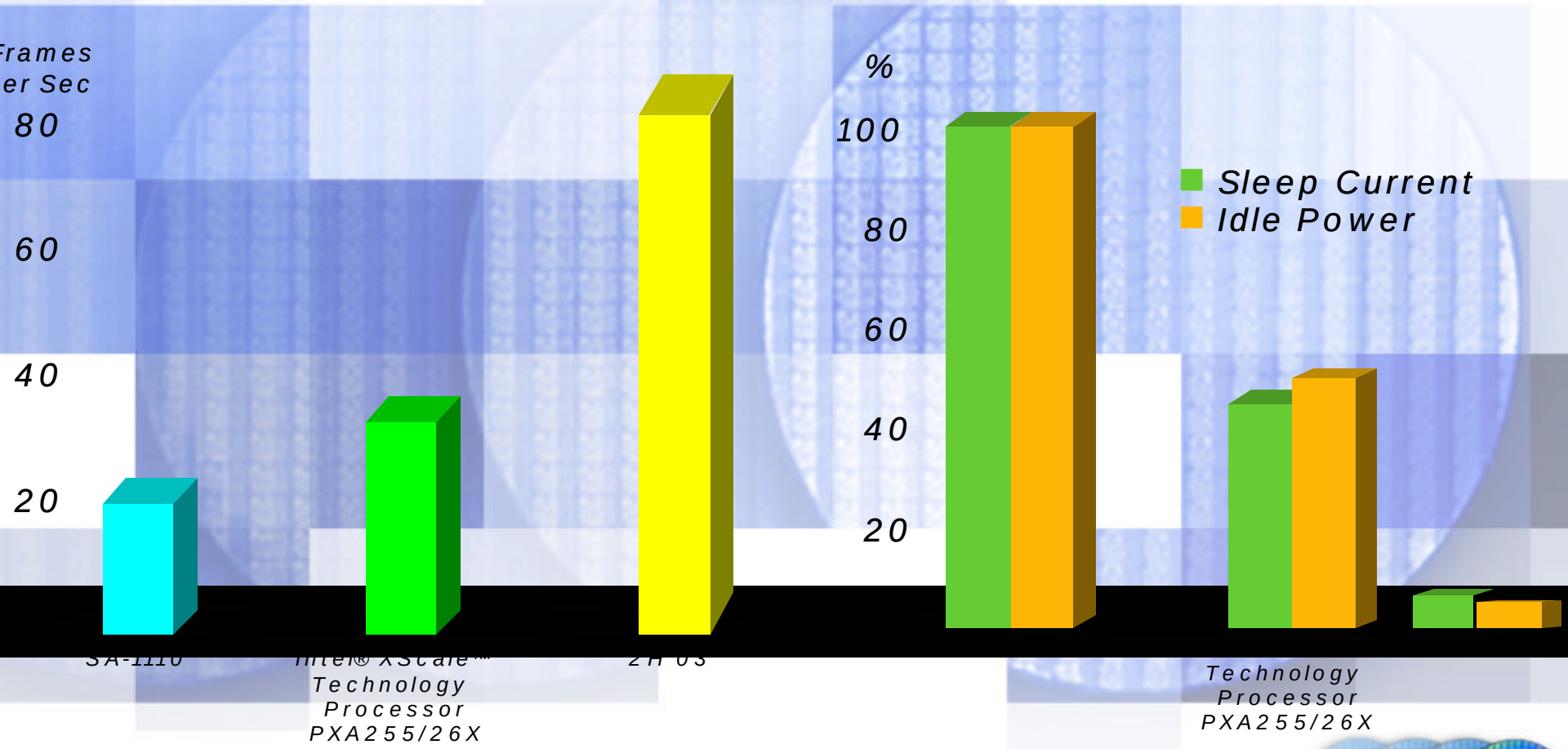
Technology Leadership

Intel® XScale™ Microarchitecture

Performance and Low Power Leadership

MPEG-4 Decode

Lower Power



Source: Intel Corporation using MPEG-4 decode sample code for the Intel® Integrated Performance Primitives for MPEG-4 decode. Performance tests and ratings are measured using specific computer systems and/or components and reflect the approximate performance of Intel products as measured by those tests. Any difference in system hardware or software design or configuration may affect actual performance.

Technology Leadership

Moving Into Cell Phones

Leading Cores
Leading Integration

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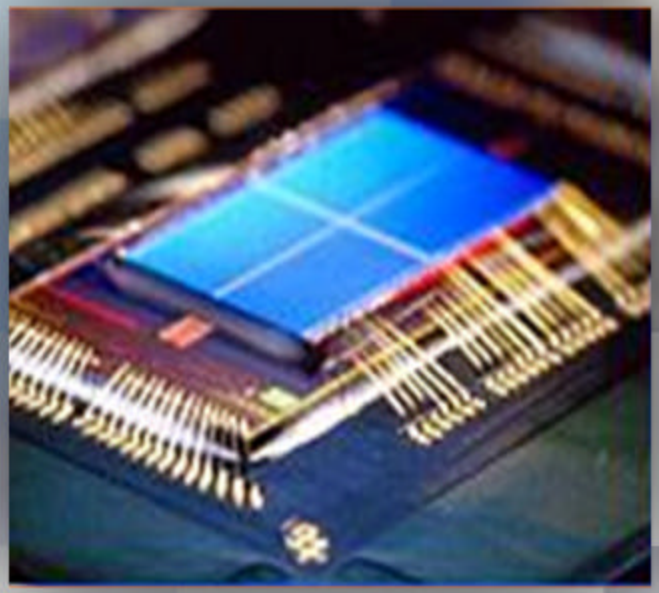
Technology Leadership

Integration
Stacking



Intel is #1 at Stacking
Over 100M Units Shipped

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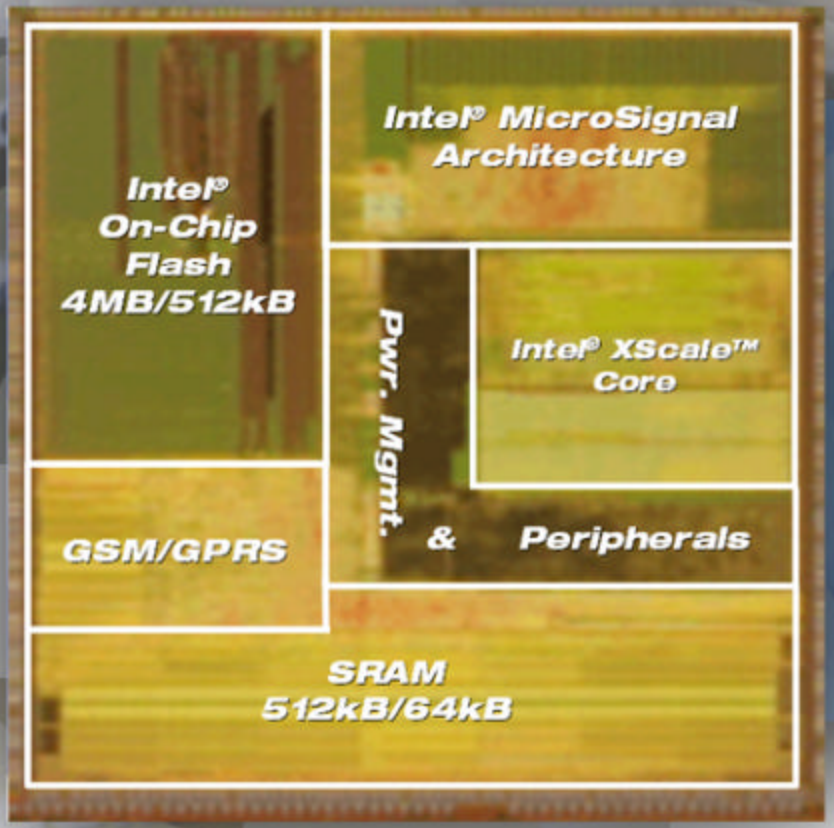
Wireless-Internet-On-A-Chip

Intel® PXA800F Cellular Processor



Industry's 1st single-chip GSM/GPRS solution

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Complete Solution for Communications

Capabilities

>10 Years Delivering Cellular Chipsets

Validated Protocol Stack

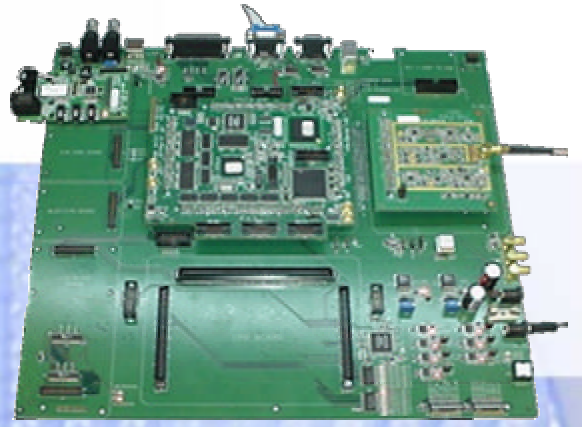
GSM/GPRS Class 8 and 12

Intel® MicroSignal Architecture runs EDGE without a co-processor

Tools

Development Kit

Phone Reference Designs



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Strong Phone Momentum

TCL集团股份有限公司
TCL CORPORATION

SAMSUNG

BIRD
宁波波导股份有限公司

Motorola Inc., unveiled a handset last week that uses one of Intel's microprocessor chips to control the computing functions.

Wall Street Journal 2/17/03

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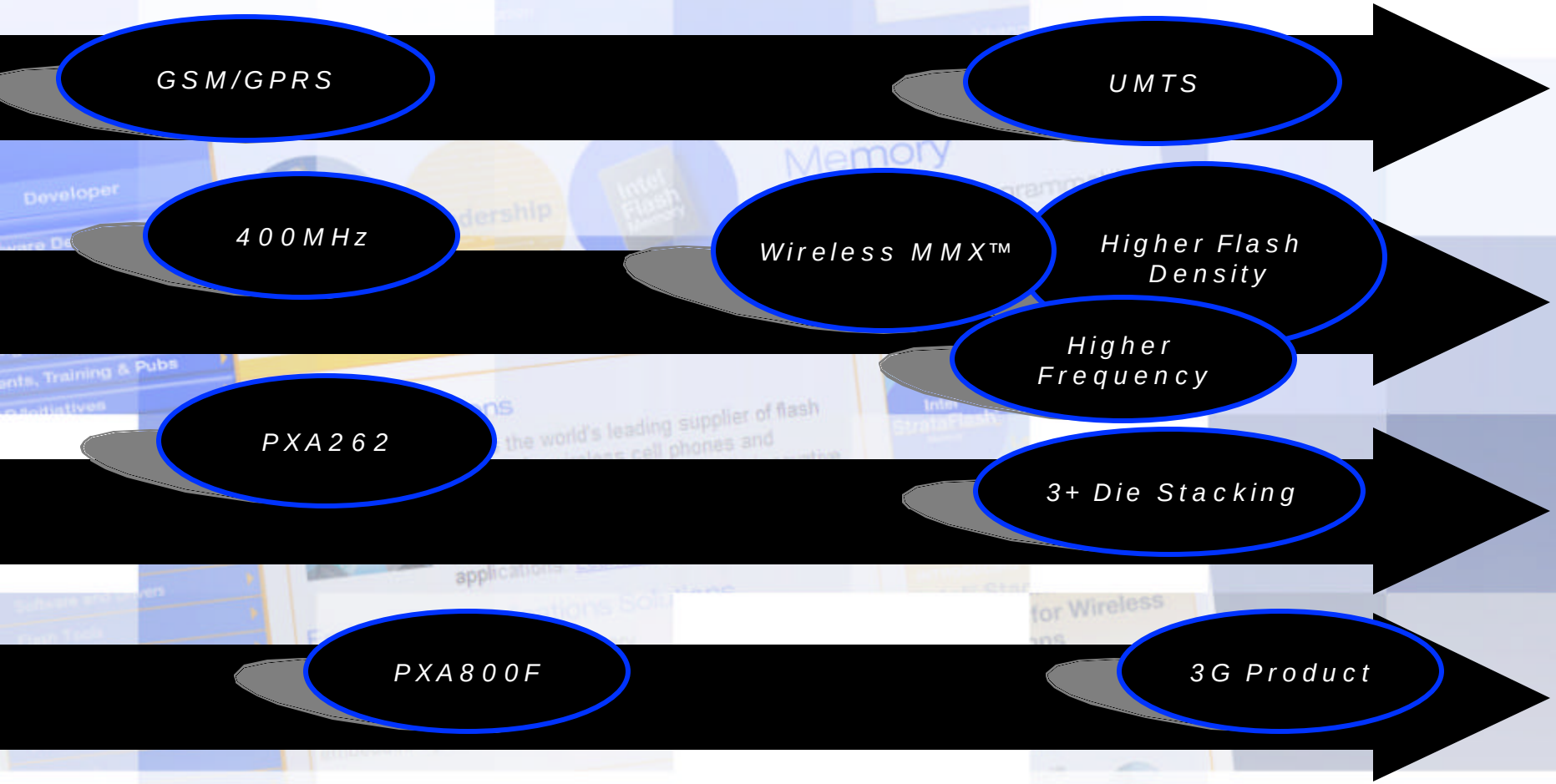
Future Advancements



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Intel® PCA

Compute

Memory

Communications

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Technology Leadership

Intel® PCA Development Ecosystem

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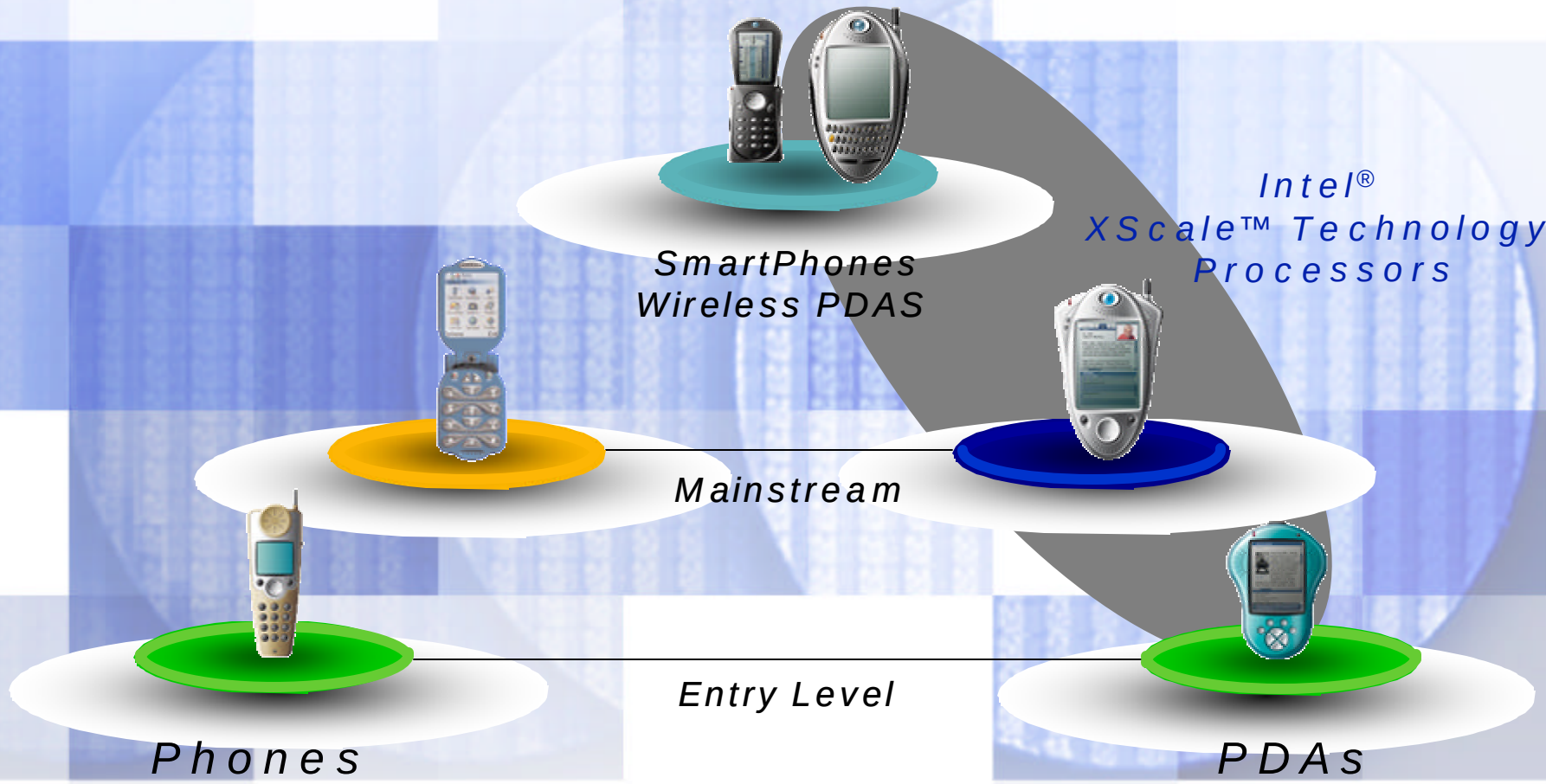
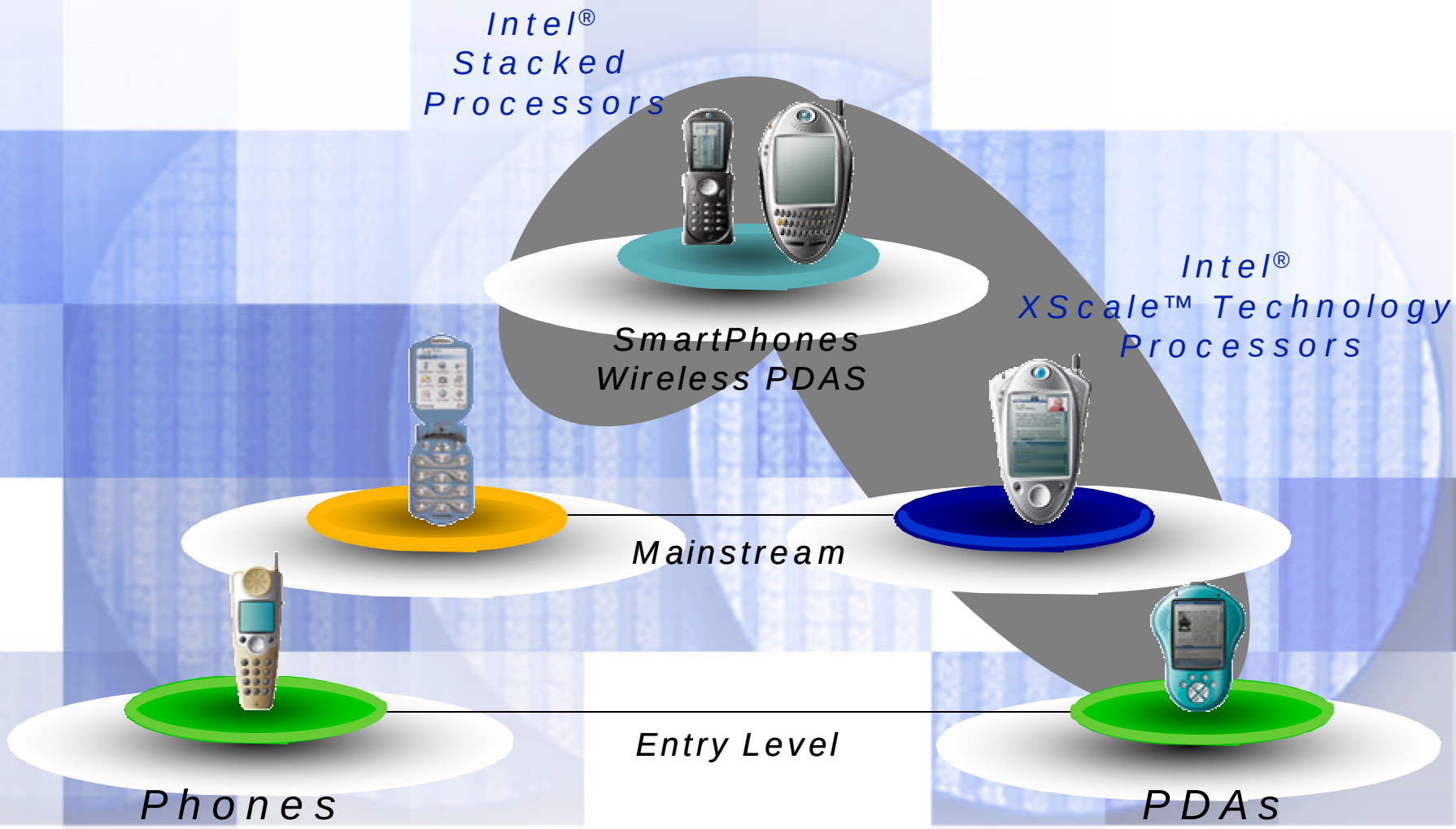
Intel Product Breadth

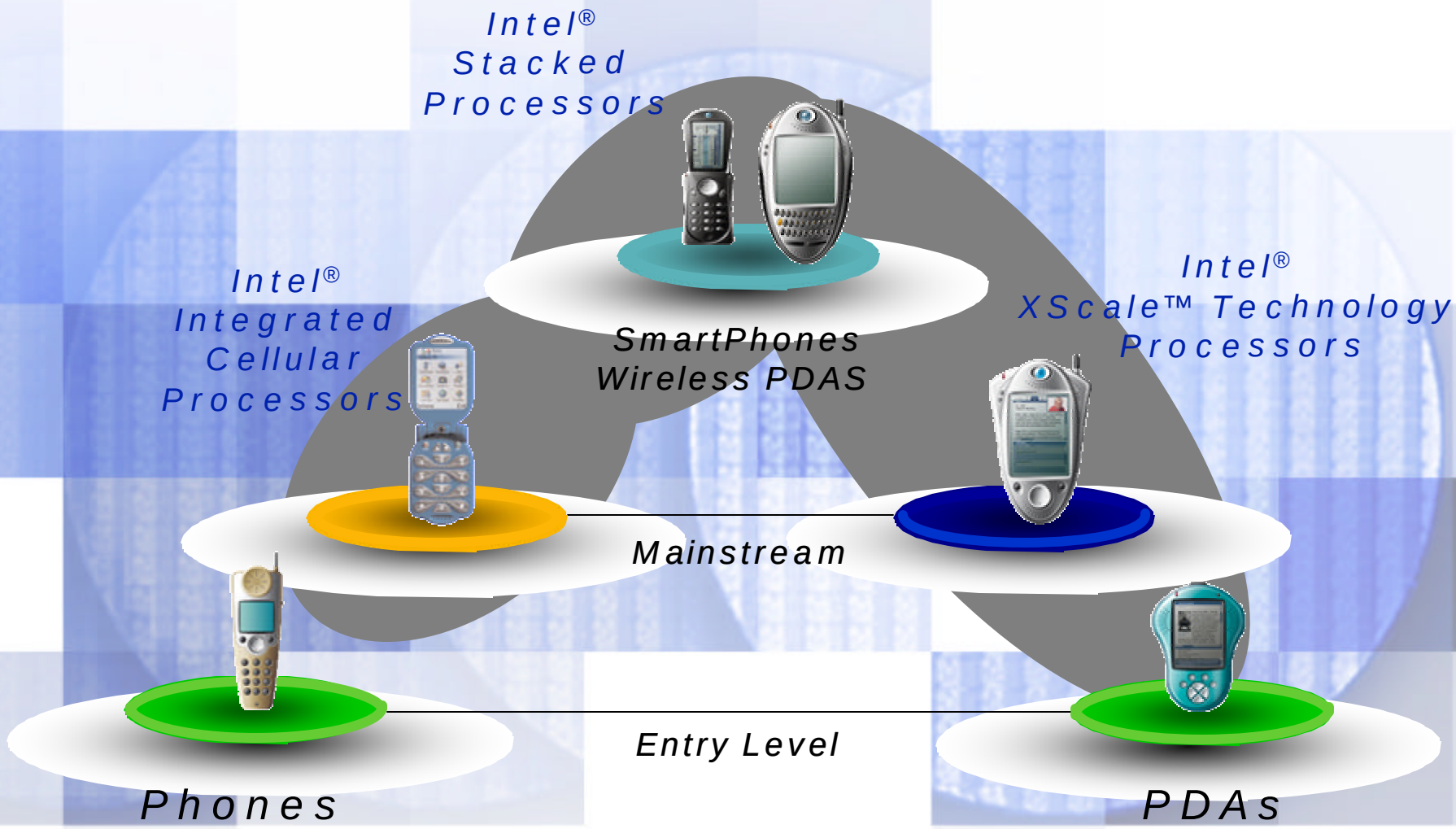
Intel Product Breadth



Intel Product Breadth



Intel Product Breadth



Summary

Move to data is underway

Winning through the transition with leading cores, integration and full solution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Source: Intel Corporation using MPEG-4 decode sample code for the Intel® Integrated Performance Primitives for MPEG-4 decode.

Test Configuration: For MPEG-4 decode: PPC2002 OS; Intel SA-1110, Intel PXA250, Intel PXA26x results were measured on devices running PPC2002 with 240x320 16-bit display; future offering results measured with 480x640 16-bit display. Intel SA-1110 results measured on HP iPaq* 3650 device. Intel PXA250 and Intel PXA26x results measured on Intel DBPXA250 test platform at 400 MHz, respectively. Future offering results are estimates only measured on a test platform at 400 MHz. Results shown are average of three runs. For sleep and idle current: Intel SA-1110, Intel PXA250, Intel PXA26x results were measured on Intel DBPXA250 test platform at 206 MHz, 200 MHz, and 200 MHz, respectively. Future offering idle and sleep are estimates only and not verified on actual silicon. Power is based on processor core estimates only and not other components in the system. Performance tests and ratings are measured using specific computer systems and/or components and reflect the approximate performance of Intel products as measured by those tests. Any difference in system hardware or software design or configuration may affect actual performance.