

Unleashing new opportunities with Cloud

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Digital Convergence Across All Industries

Traditional Economy



Digital Economy

“Digital Convergence”

Blending of Traditional and Digital Business

Automotive car sharing, lifestyle, co-creation

Watches – Tag Heuer.
Apple Watch. Basis

Retail - Nordstrom / Digital mirrors. Nike co-creation

Banking at a digital tipping point?

Energy -Smart meters/GRID.
Home automation (HIVE)

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



Transformation enables **BUSINESS** Outcomes



**TRUSTED
Data Driven**
(Big Data)

Transform business with trusted, real-time data



**Smart
World**
(IoT)

Drive operational excellence and revenue via extended insights



**On-Demand
SECURE
CLOUD**

Reduce IT/operational technology cost;
Increase agility



Trusted
(Security)

Reduce business risk and protect brand value with security and privacy



**Connected
Experience**
END to END

Win and retain customers with stunning connected experiences



**Innovative
Workforce**
(Business Client)

Ignite innovation and productivity through transformed workplaces

Opportunity: Cloud Enables New Usages

Cloud 2015 Digital Services Economy



1

66% of current cloud demand comes from consumer services¹

Cloud 2020 IoT, Big Data, and Enterprise



By 2020, 65-85% of apps will be delivered via cloud infrastructure²

1. Source: Intel analysis, 2015

2. Source: Intel analysis, 2015

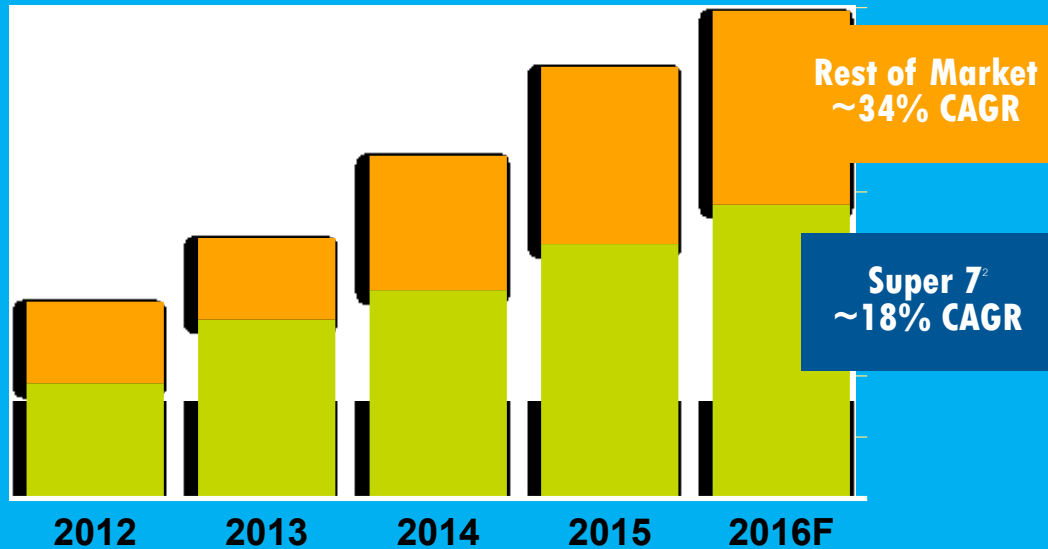
Why cloud?



By 2020 **85%** of applications delivered via Cloud

The Cloud Market is Diversifying

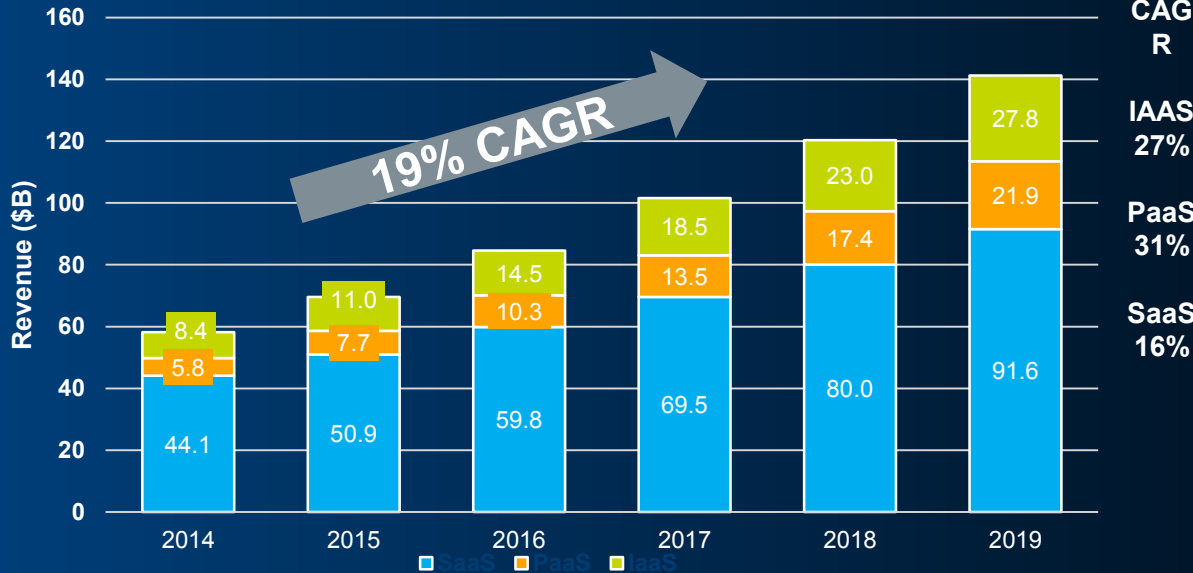
Cloud Service Providers Growth



Connected Devices + Apps + New Services + New Service Providers

Public Cloud Mix Shift

2014-2019 Revenue (\$B)



SERVICES GROWTH

2015 YoY Growth

Americas
20%

Europe & Middle East

14%

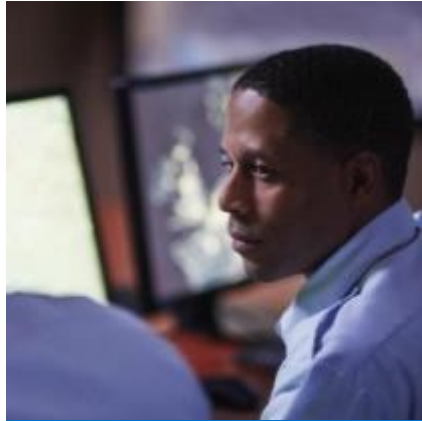
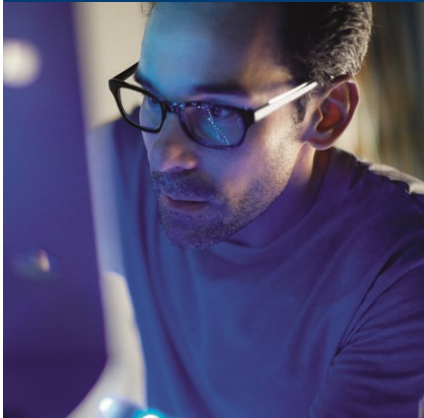
Asia
28%

New Services and Service Differentiation will Drive Growth

Critical Success Factors for Cloud Service Providers

Differentiated Services

“As the digital transformation continues to accelerate, my challenge is to extend offerings beyond the infrastructure stack while demonstrating ROI.”



Agility

“I need the ability to monitor systems and identify when a resource reached its capacity and/or performance limits.”



TCO

“I need to scale and maintain SLAs in the face of growing customer demands while optimizing cost of service delivery.”



Business Opportunities with Next Wave of Growth

Intel has enabled
70+ CSPs with
differentiated
services in:



Performance



Security



Workload
Optimization

\$1T in New 'Converged' Services by 2020:



+ \$200B
new cloud services

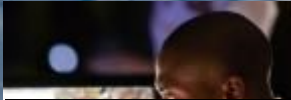


+ \$200B
new video services



+ \$600B*
new mobile services

What That Means for Government...



Jobs

Millions of jobs will be impacted by the Digital transformation in all industries



Economy

Government leaders need to accelerate the transformation of their country into the new Economy



Skills Development

Upgrade education to prepare people for the jobs/skills of the future



digital inclusion

Enabling Access & Affordability, Improving Digital Literacy and Financial inclusion



Improve government services

Citizens expectation are at all time high and Gov't need to embrace Digital Services



Evolve Government IT infrastructure

Modernize & Transform ICT to enable Digital Government eServices Platform foundation

Customer TOP of Mind in Cloud Adoption

Top 5 Considerations for CSP Selection Worldwide

1. Security
2. Total Cost of Ownership
3. Reliability
4. Ease of Implementation & Scalability
5. Manageability

Top 5 Considerations for CSP Selection Europe

1. Security
2. Total Cost of Ownership
3. Control of Data & Environment
4. Scalability & Flexibility
5. Reliability & Uptime

Facilitating faster adoption of cloud computing

Build trust in cloud solutions

- robust legal frameworks for data protection and cybersecurity
- government incentives for organizations to adopt security technologies
- refer to industry best practices and standards to ensure future proof and scalable solutions

Government cloud

- consider government role as promoter of cloud solutions for public data services

Broadband adoption

- High-speed broadband networks and reliable infrastructure are critical for expanding and connecting the cloud

What EU policymakers are focusing on?

PRIVACY & SECURITY

GDPR (General Data Protection Regulation)
E-privacy directive review
NIS Directive (Network Information Security)
cPPP (cybersecurity public private partnership)

DATA

European Cloud initiative
Free flow of data

CONNECTIVITY

Electronic Communications Code
Action Plan on 5G

