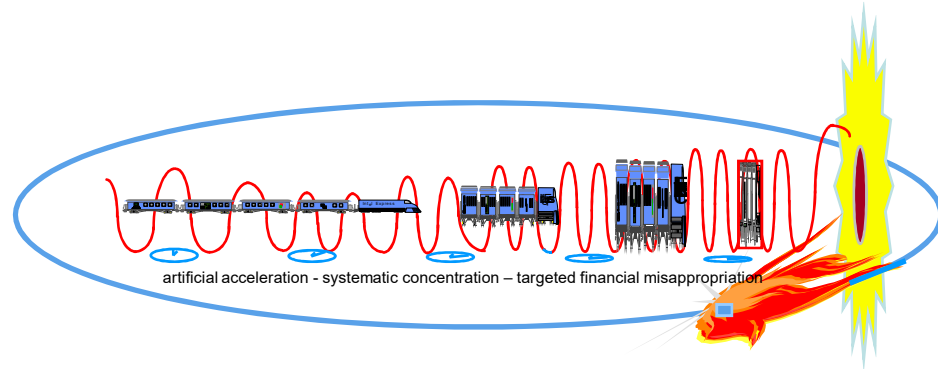


Production Economics Complete
up front first 16 slides, Intel begins slide 17



IT'S A WRAP

x86 Server Today with Channel Inventory
Supply Wave Slides – Cost optimization NOW

“ . . . all we can ever know about the real world is what the world is not”

Ernest Von Glasersfeld, Radical Constructivism

Camp Marketing Consultancy – Server Today

Summary for Federal Trade Commission, United States Department of Justice, States Attorneys General Departments of Consumer Protection, Intel Inside price fix recovery “lawful class” and industry sealed actions;

AMD run end surplus; yes

AMD bundle deal sales revenue sacrifice; yes

AMD buy two get one free, derivatives thereof, first dollar; highly likely

AMD non reported non accounted revenue; not suspect

Intel run end surplus; yes

Intel mid run price at cost; yes

Intel run end dumping price < variable cost; yes (Areeda Turner Review)

Intel bundle deal sales revenue sacrifice; yes

Intel buy two get one free, derivatives thereof, first dollar; highly likely

Intel not accounted nor reported and / or laundered product values; yes

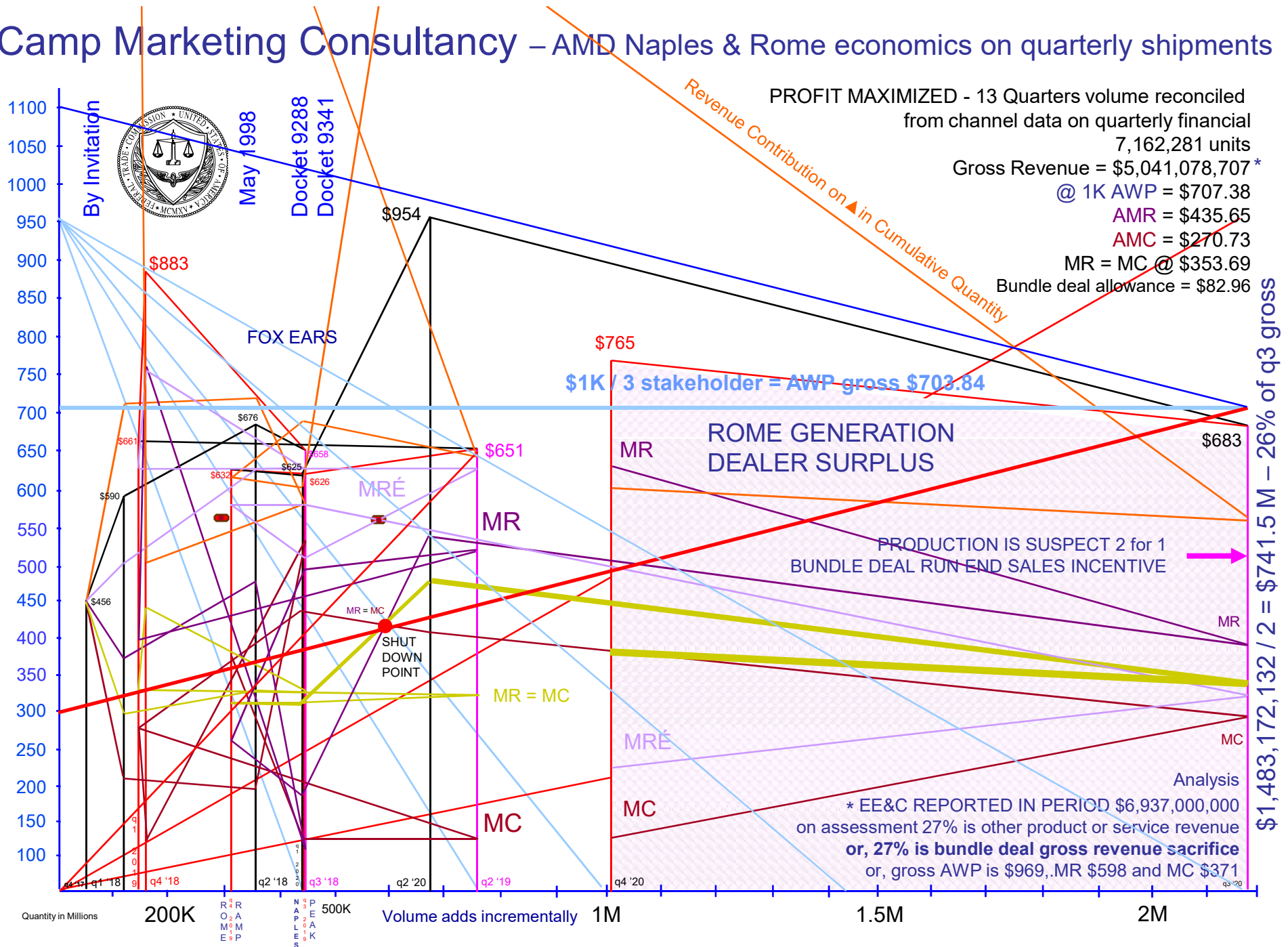
Intel 2020 not accounted nor reported revenue = \$72,640,790,669 (suspect rainy day fund)

Intel supply chain accomplice in non reported / accounted revenue; likely

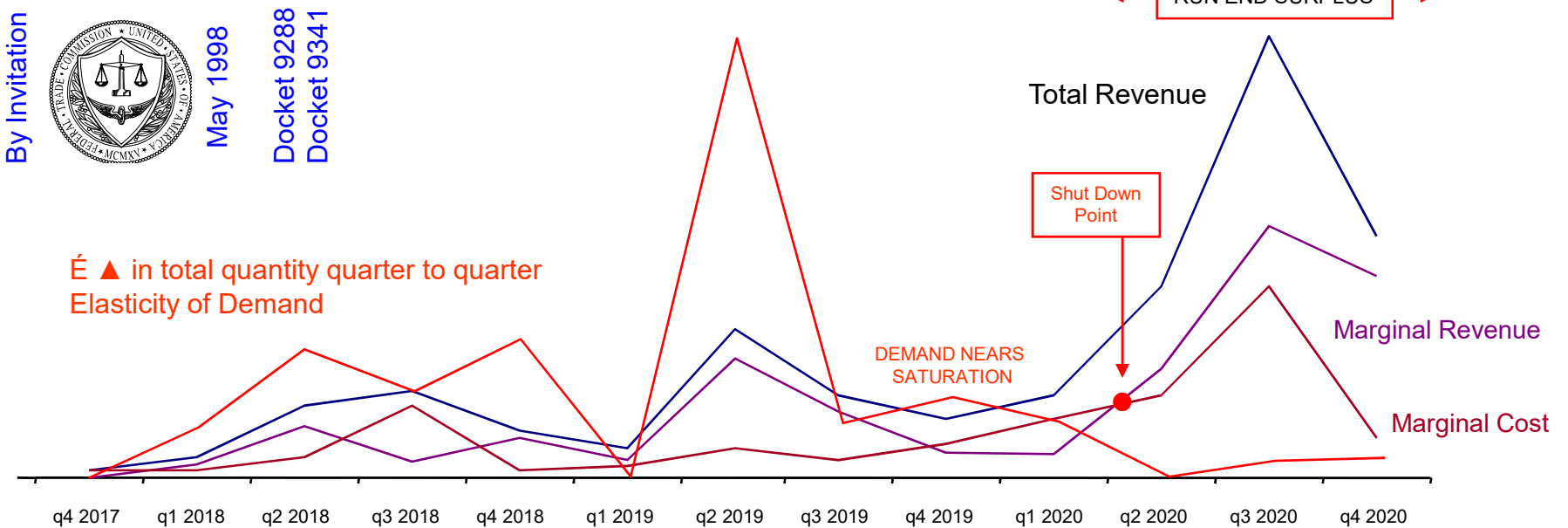
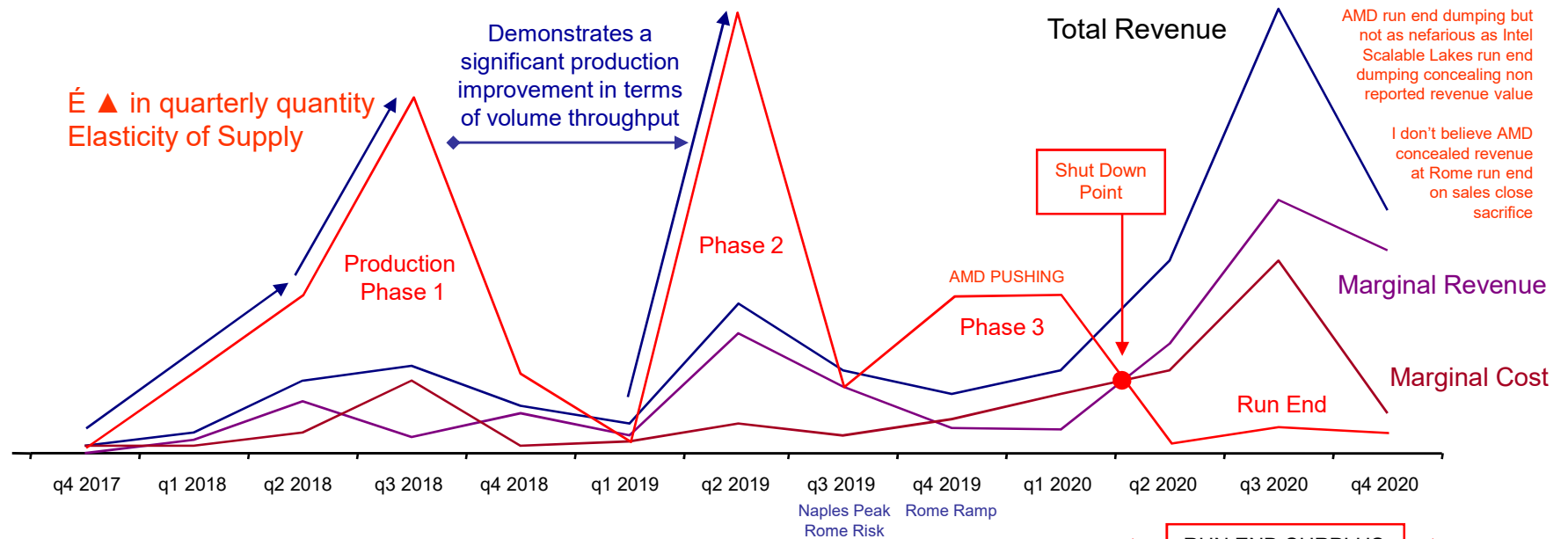
Federal tax evasion; suspect (political deal Data Center Division q3 is bankrupt behind the books)

S.E.C. 10K reporting violations; absolutely on going for a decade

Camp Marketing Consultancy – AMD Naples & Rome economics on quarterly shipments



Camp Marketing Consultancy – AMD Naples & Rome economics on quarterly shipments



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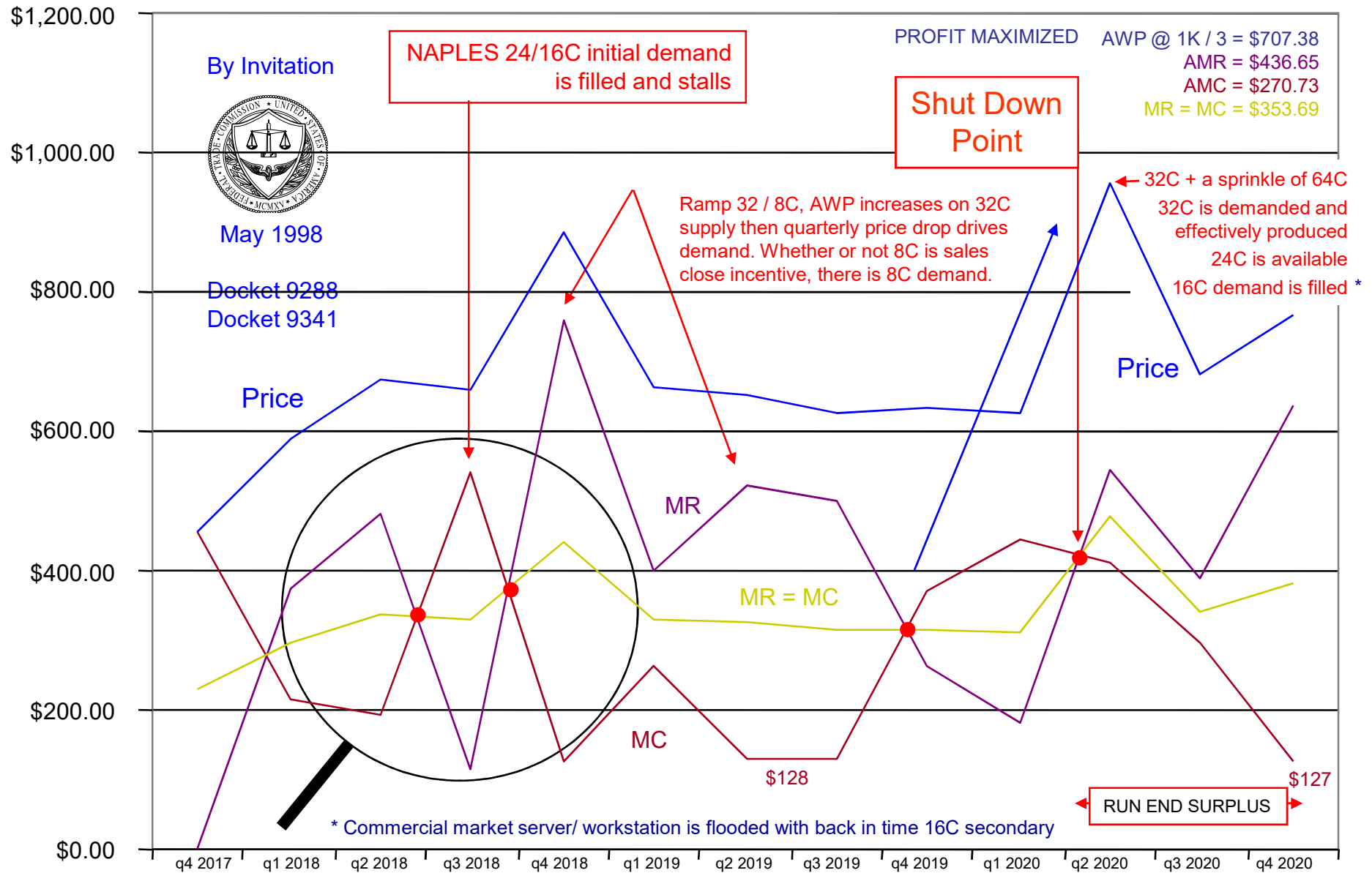


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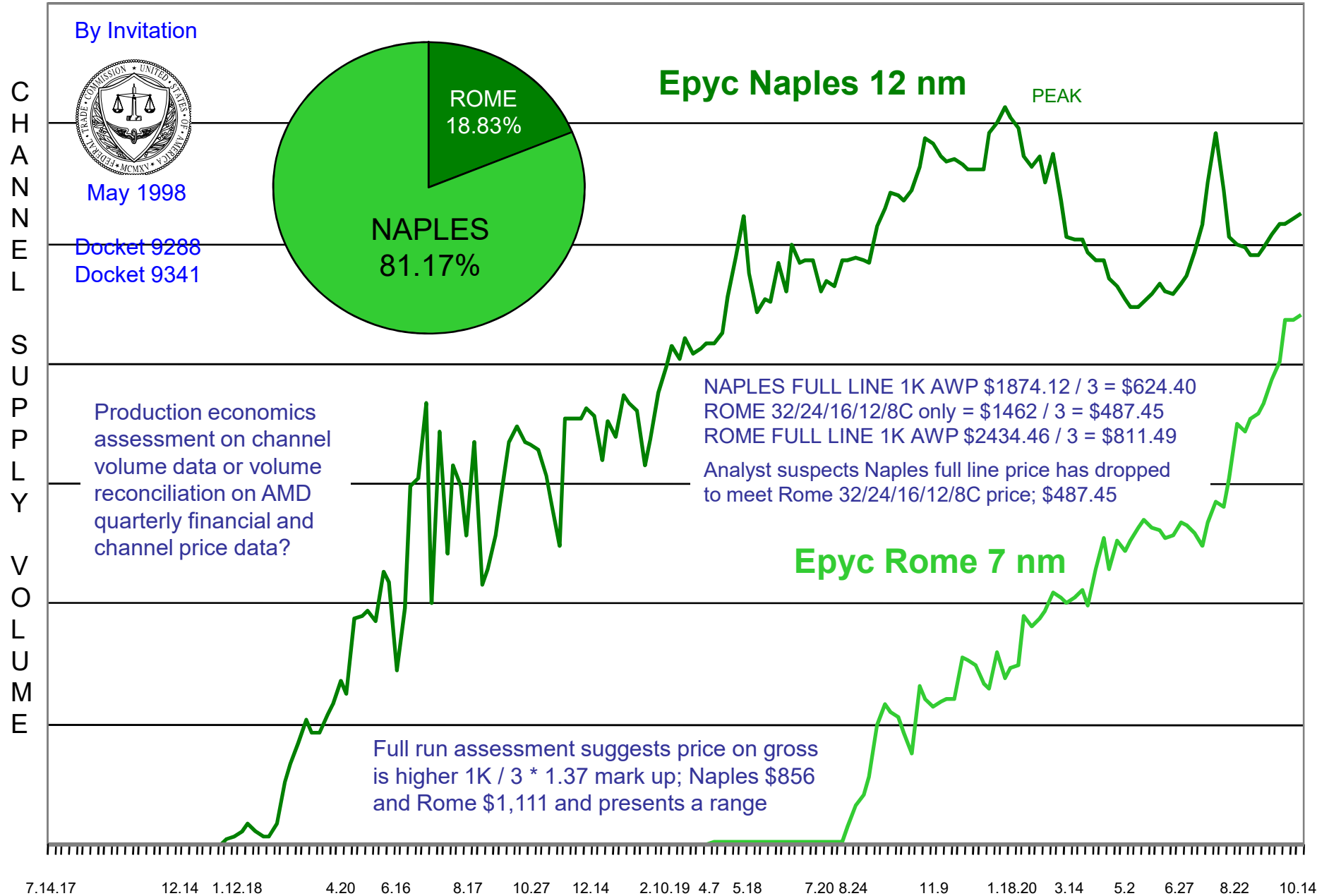
Docket 9341

Camp Marketing Consultancy – AMD Naples & Rome economics on quarterly shipments

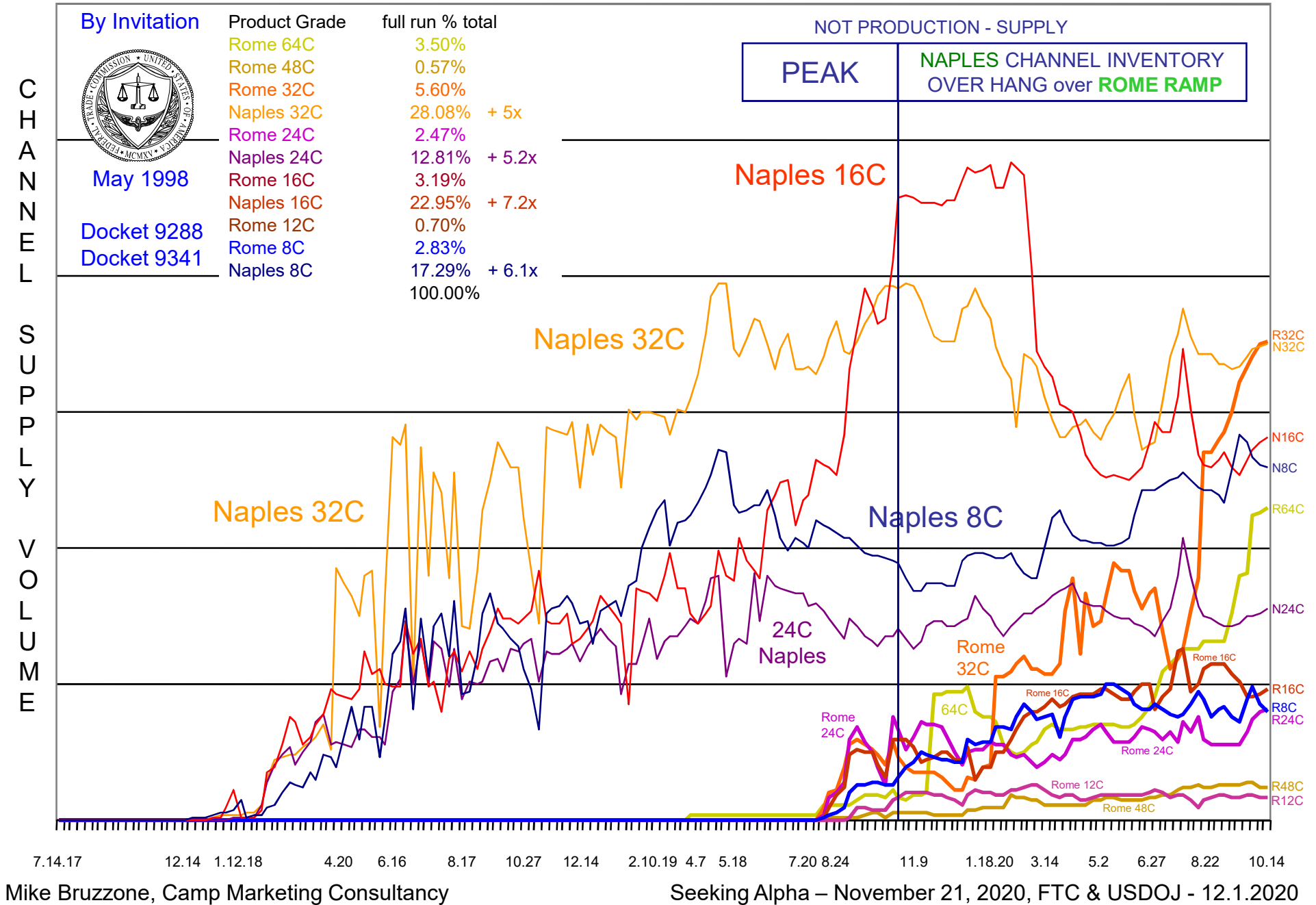


48C MCM at price is not effective to produce at 7 nm. 64C is expensive and whether 5 nm will resolve is a question. On heat > 32C is ARM's LP in?

Camp Marketing Consultancy – AMD Naples & Rome shown on channel inventory data

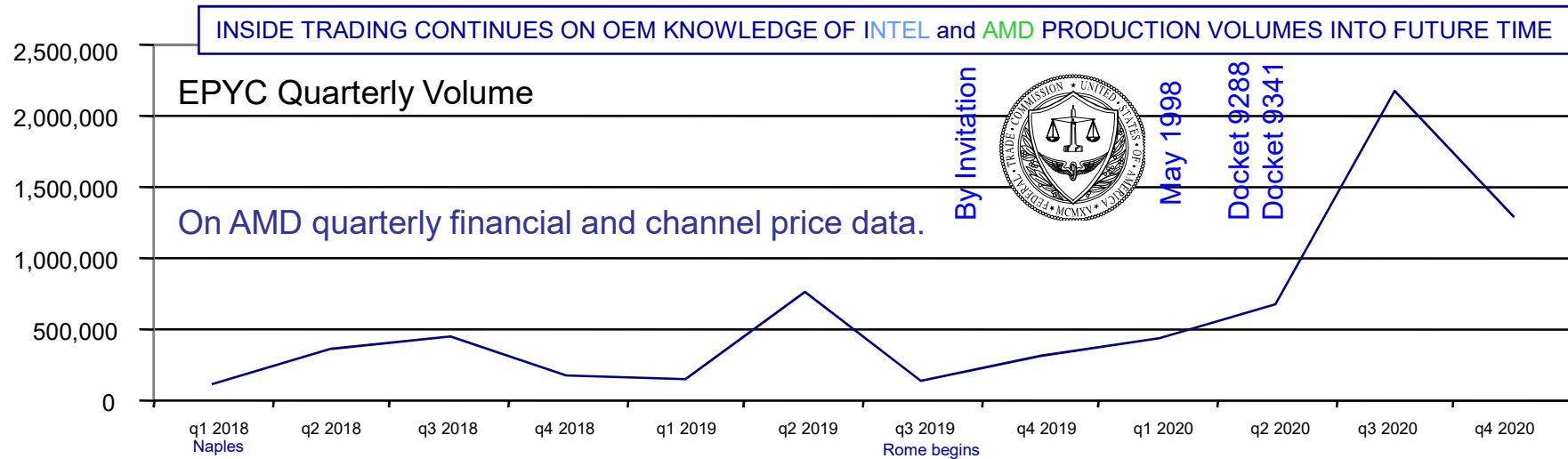


Camp Marketing Consultancy – AMD Naples & Rome shown on channel inventory data



Camp Marketing Consultancy – AMD Naples & Rome economics on quarterly shipments

Volume on Financial	q1	q2	q3	q4	Total
Epyc 2018	117,211	357,003	445,297	178,426	1,097,937
Epyc 2019	148,784	766,115	137,346	310,640	1,362,885
Epyc 2020	441,392	670,731	2,171,805	1,287,804	4,571,732
					7,032,554



INVENTORY CURRENT

Product Grade	% 11.15.20	
Rome 64C	11.93%	
Rome 48C	1.24%	
Rome 32C	18.26%	
Naples 32C	18.15%	50 : 50
Rome 24C	4.25%	
Naples 24C	8.09%	+ 1.9x
Rome 16C	4.98%	
Naples 16C	14.63%	+ 2.93x
Rome 12C	0.83%	
Rome 8C	4.15%	
Naples 8C	13.49%	+ 3.25x
	100.00%	

PRODUCTION

Naples total volume = 2,012,836

Rome total volume = 5,019,718

Analyst disqualifies Naples is still produced by Global Foundries and,

- 1) Channel is servicing continued Naples 12 nm demand and/or build out.
- 2) Channel is sitting on a lot of Naples at 'risk inventory' verse Rome 7 nm.
- 3) Naples at risk presents an accumulated capital potential loss scenario.
- 4) Naples, one would think, offers performance benefit v Xeon secondary?

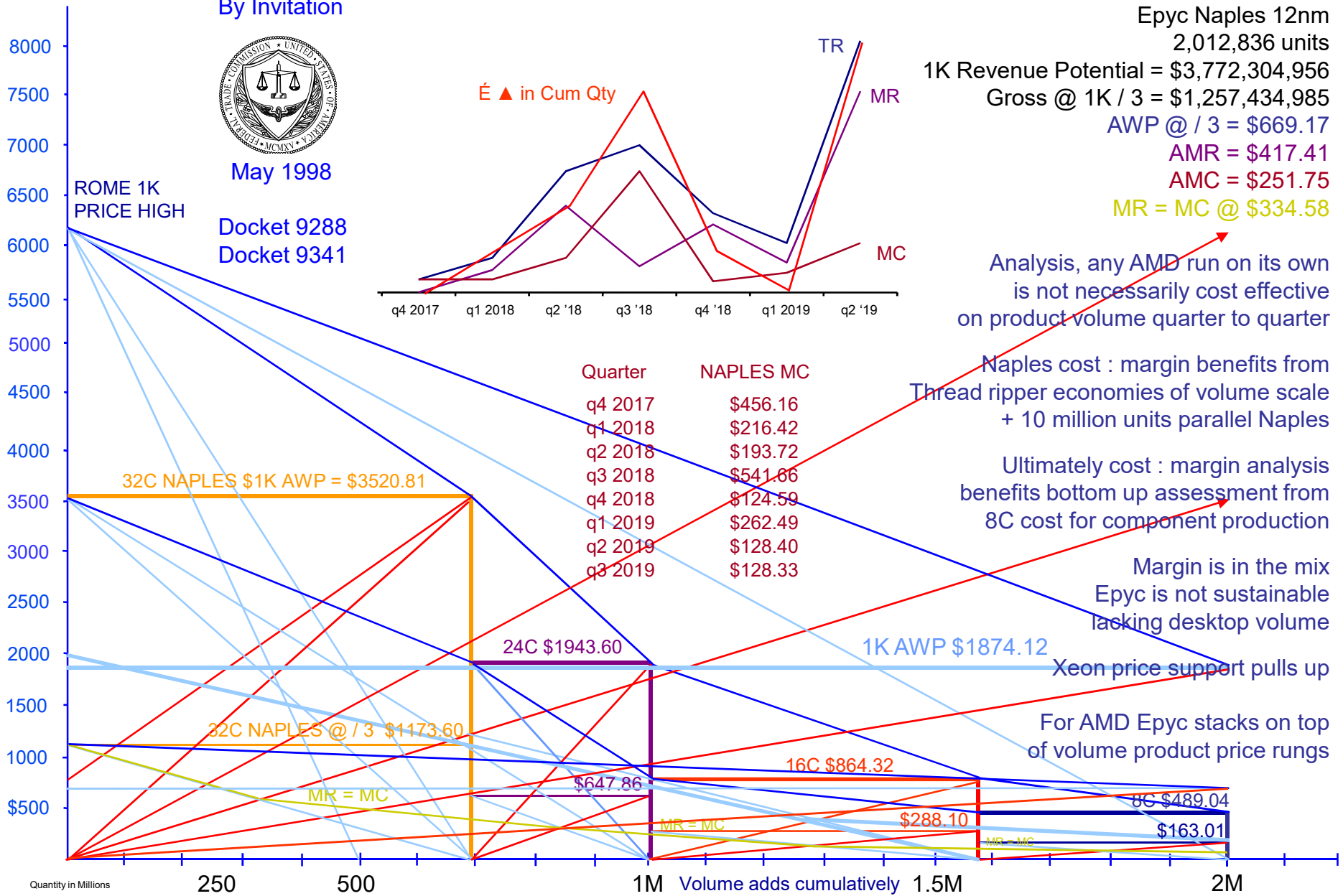
Camp Marketing Consultancy – Naples by Core Grade on quarter ship and % grade SKU price

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Epyc Naples 12nm
2,012,836 units
1K Revenue Potential = \$3,772,304,956
Gross @ 1K / 3 = \$1,257,434,985
AWP @ / 3 = \$669.17
AMR = \$417.41
AMC = \$251.75
MR = MC @ \$334.58

Analysis, any AMD run on its own is not necessarily cost effective on product volume quarter to quarter

Naples cost : margin benefits from Thread ripper economies of volume scale + 10 million units parallel Naples

Ultimately cost : margin analysis benefits bottom up assessment from 8C cost for component production

Margin is in the mix Epyc is not sustainable lacking desktop volume

Xeon price support pulls up

For AMD Epyc stacks on top of volume product price rungs

Camp Marketing Consultancy – Naples volume table on quarterly financial shipments

EPYC NAPLES

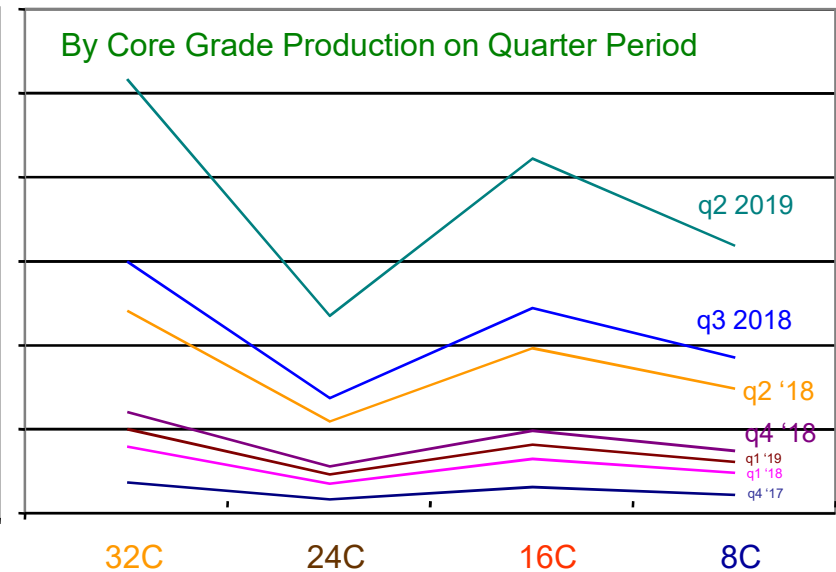
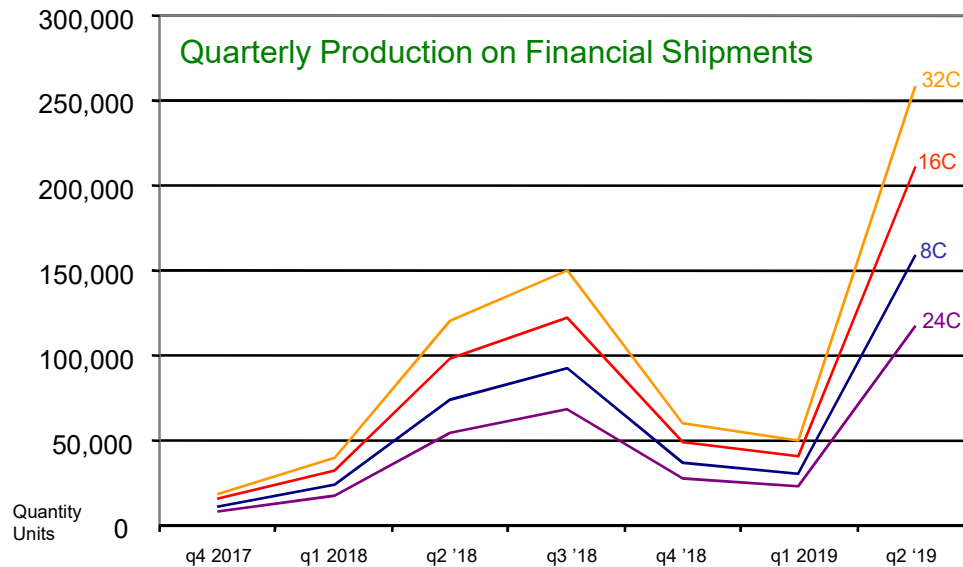
By Invitation



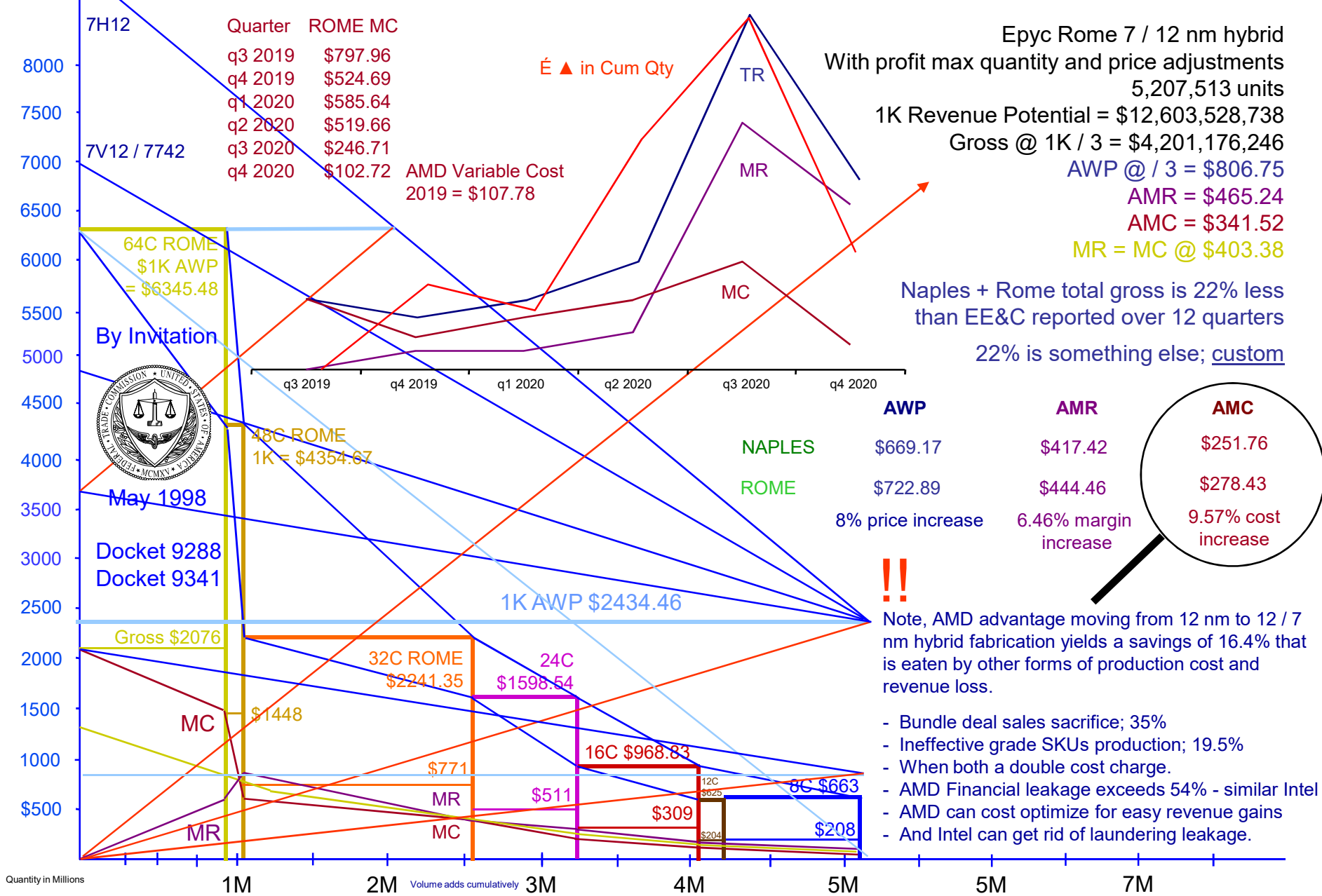
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	32C	24C	16C	8C	Units / qtr	% Total
q4 2017	18,727	8,549	15,307	11,531	54,114	2.69%
q1 2018	39,471	18,019	32,264	24,303	114,058	5.67%
q2 2018	120,223	54,883	98,269	74,023	347,399	17.26%
q3 2018	149,956	68,457	122,573	92,331	433,317	21.53%
q4 2018	60,086	27,430	49,114	36,996	173,626	8.63%
q1 2019	50,104	22,873	40,955	30,850	144,781	7.19%
q2 2019	257,993	117,778	210,882	158,851	745,504	37.04%
TOTAL	696,560	317,990	569,364	428,885	2,012,799	100.00%
% by Core	34.61%	15.80%	28.29%	21.31%		

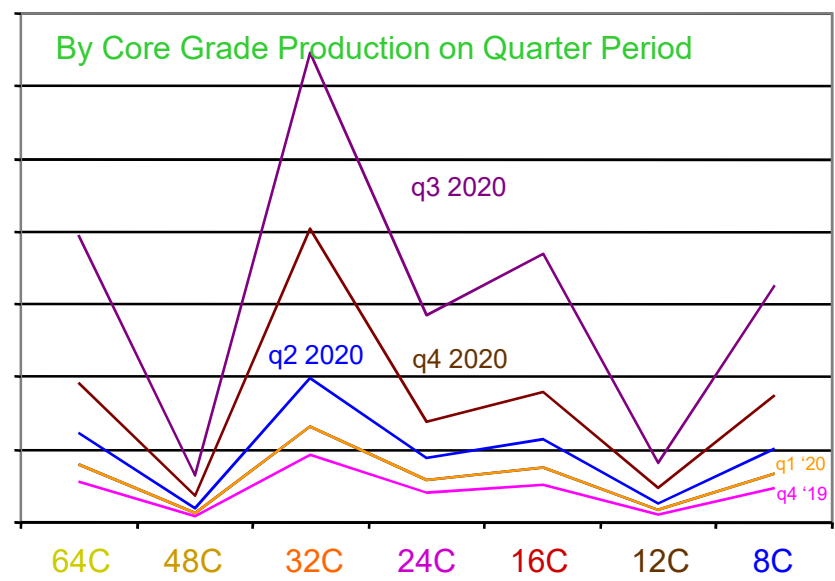
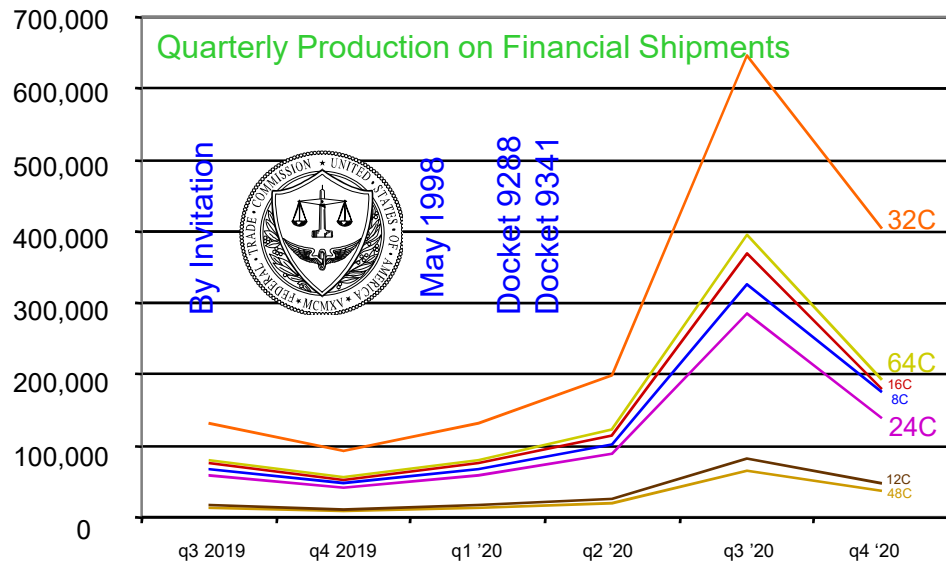


Camp Marketing Consultancy – Rome Core Grade on quarter ship and % grade SKU price

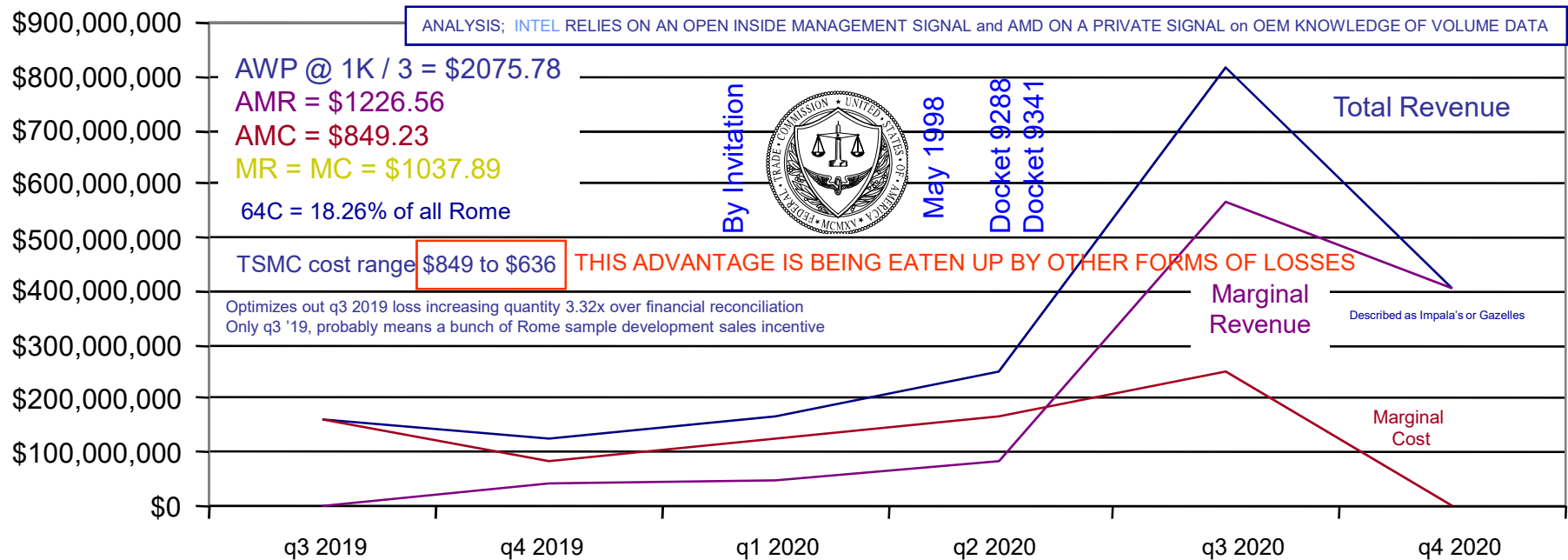


Camp Marketing Consultancy – Rome volume table on quarterly financial shipments

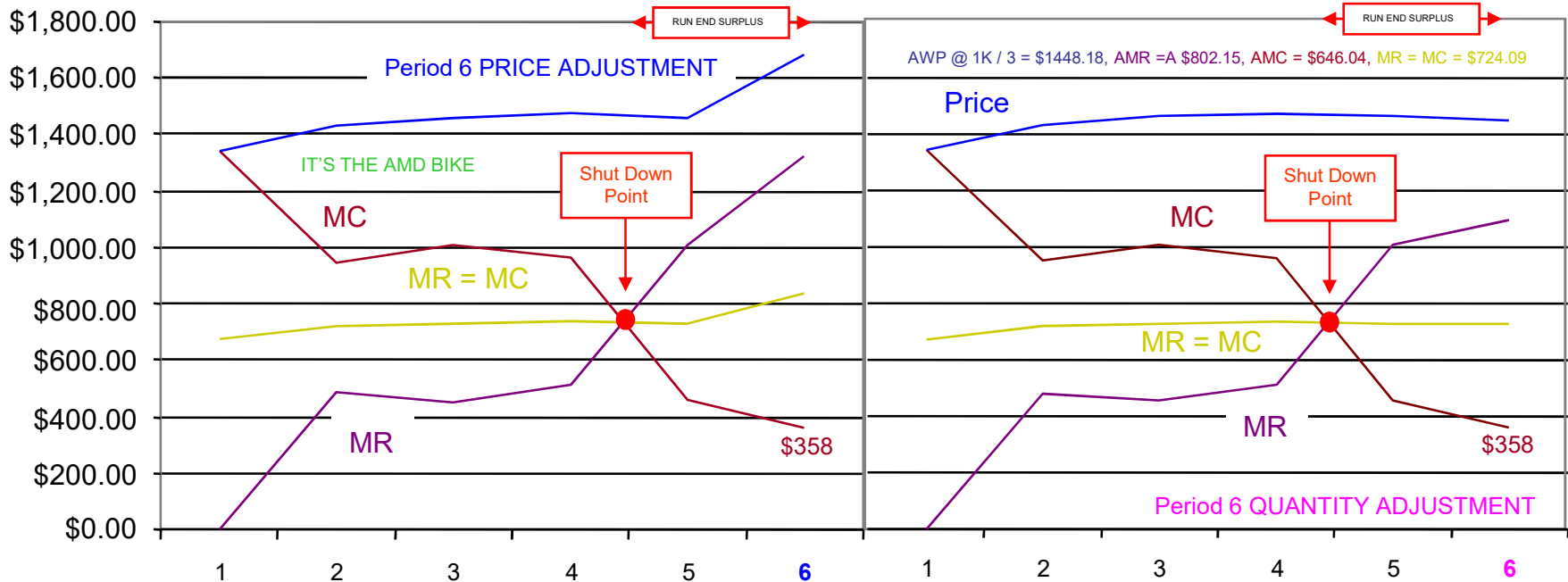
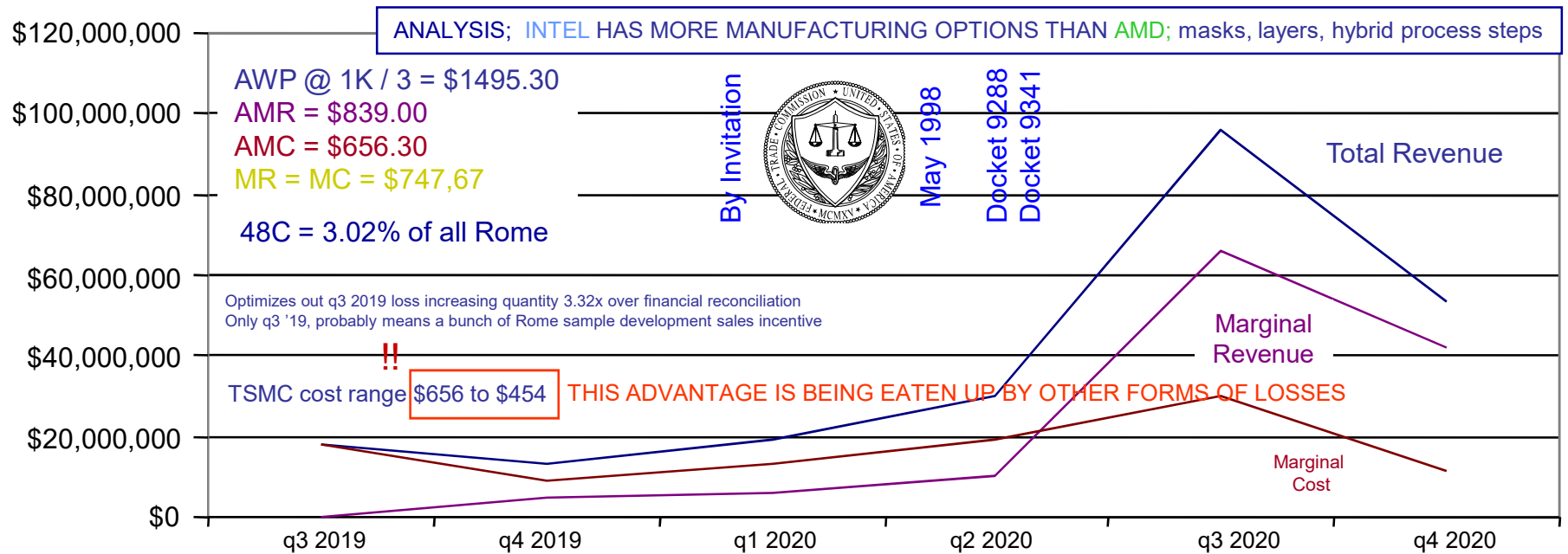
EPYC ROME	64C	48C	32C	24C	16C	12C	8C	Units / qtr	% Total
q3 2019	80,925	13,384	132,113	58,146	75,297	16,575	66,699	443,140	8.51%
q4 2019	56,666	9,372	92,509	40,715	52,725	11,606	46,705	310,298	5.96%
q1 2020	80,518	13,317	131,447	57,853	74,918	16,492	66,363	440,907	8.47%
q2 2020	122,287	20,225	199,638	87,865	113,782	25,047	100,790	669,634	12.86%
q3 2020	396,175	65,523	646,768	284,656	368,621	81,144	326,530	2,169,416	41.66%
q4 2020	192,729	37,594	403,174	138,409	179,410	48,135	174,646	1,174,096	22.55%
TOTAL	929,300	159,415	1,605,649	667,643	864,752	198,999	781,732	5,207,490	100.00%
% by Core	17.85%	3.06%	30.83%	12.82%	16.61%	3.82%	15.01%		



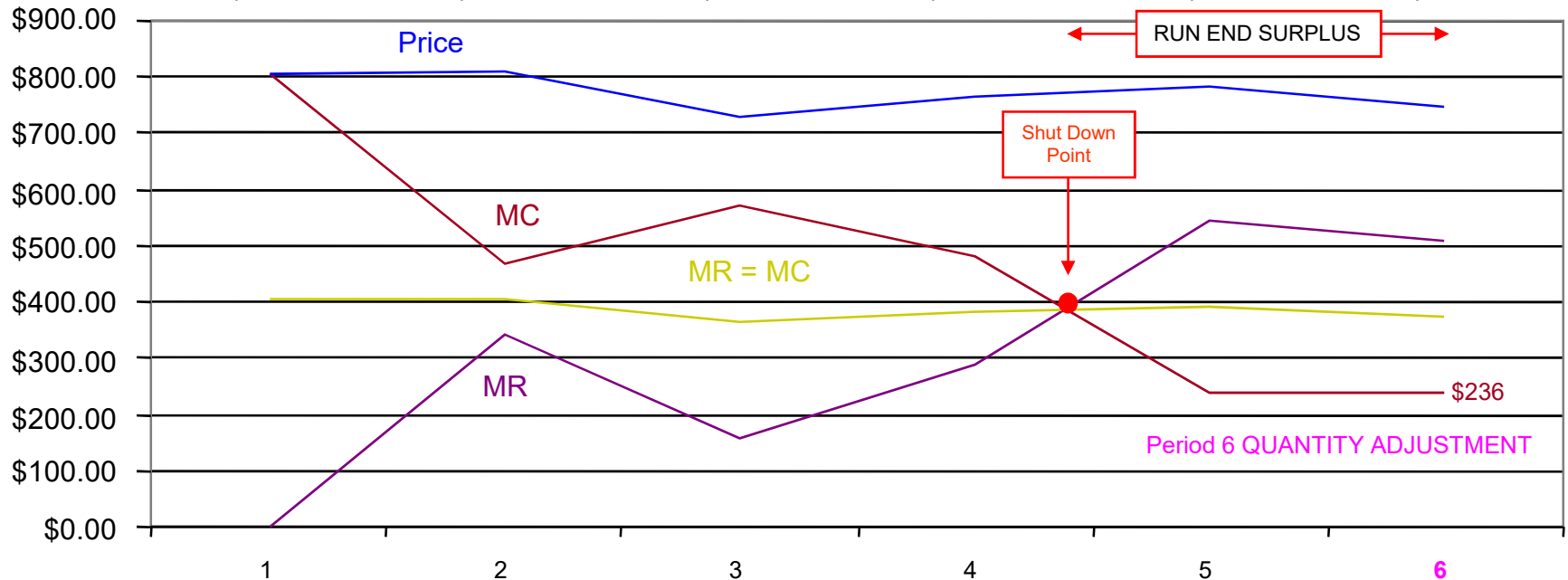
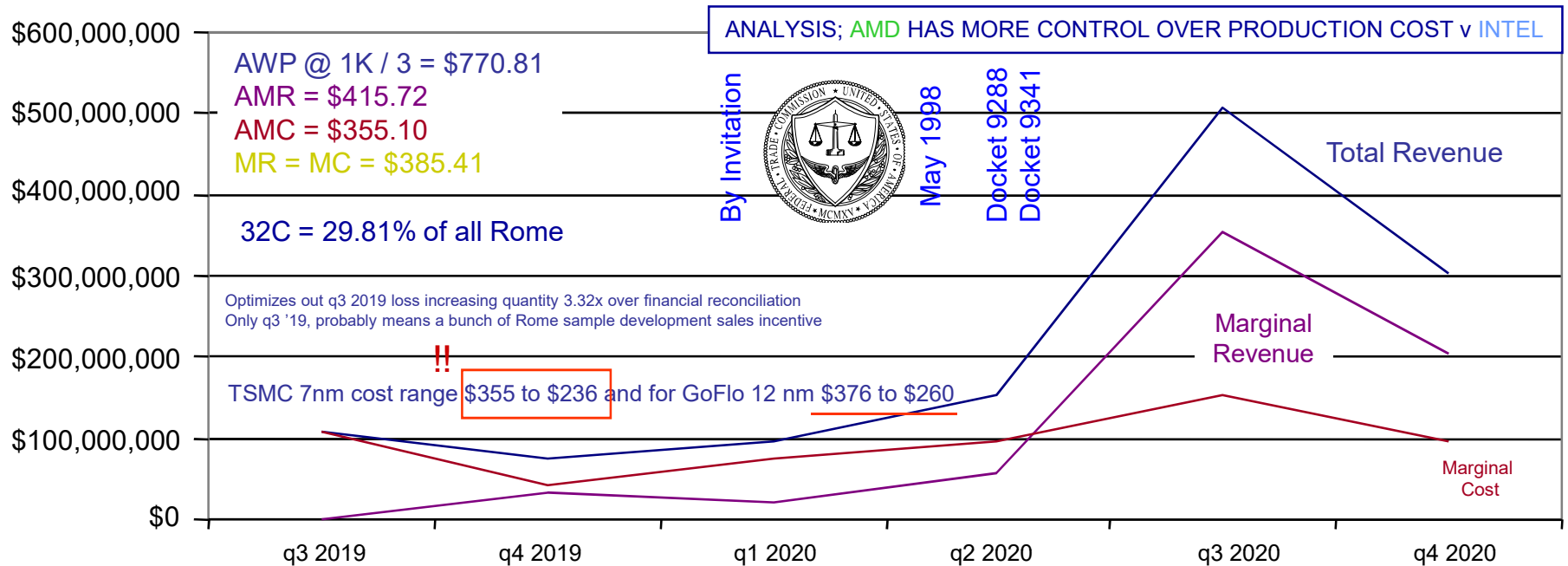
Camp Marketing Consultancy – AMD Rome 64C economics on 10K & channel \$ profit max



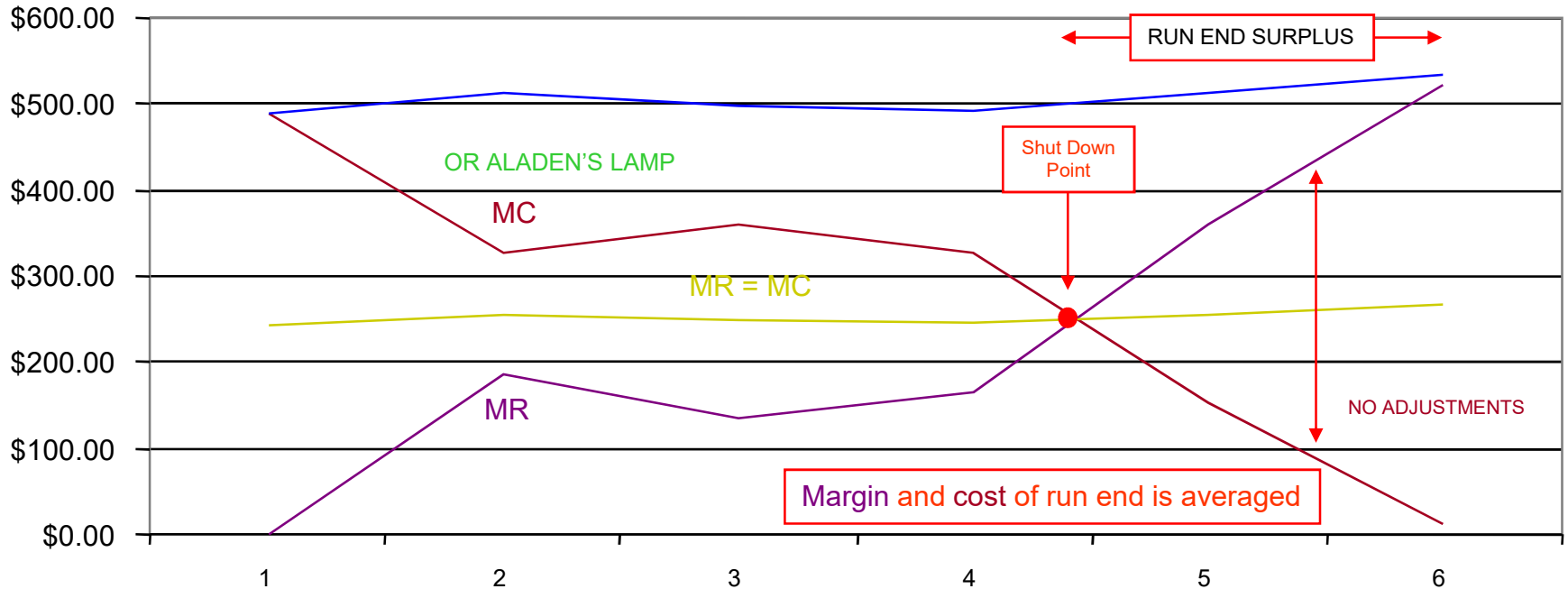
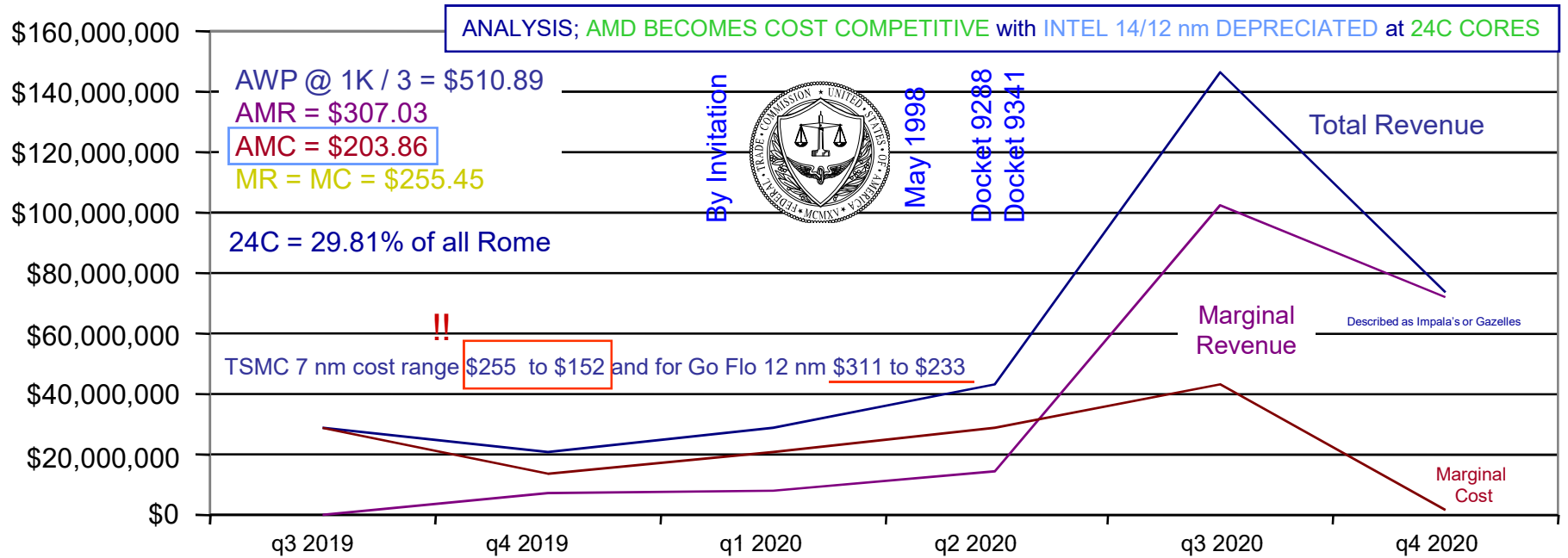
Camp Marketing Consultancy – AMD Rome 48C economics on 10K & channel \$ profit max



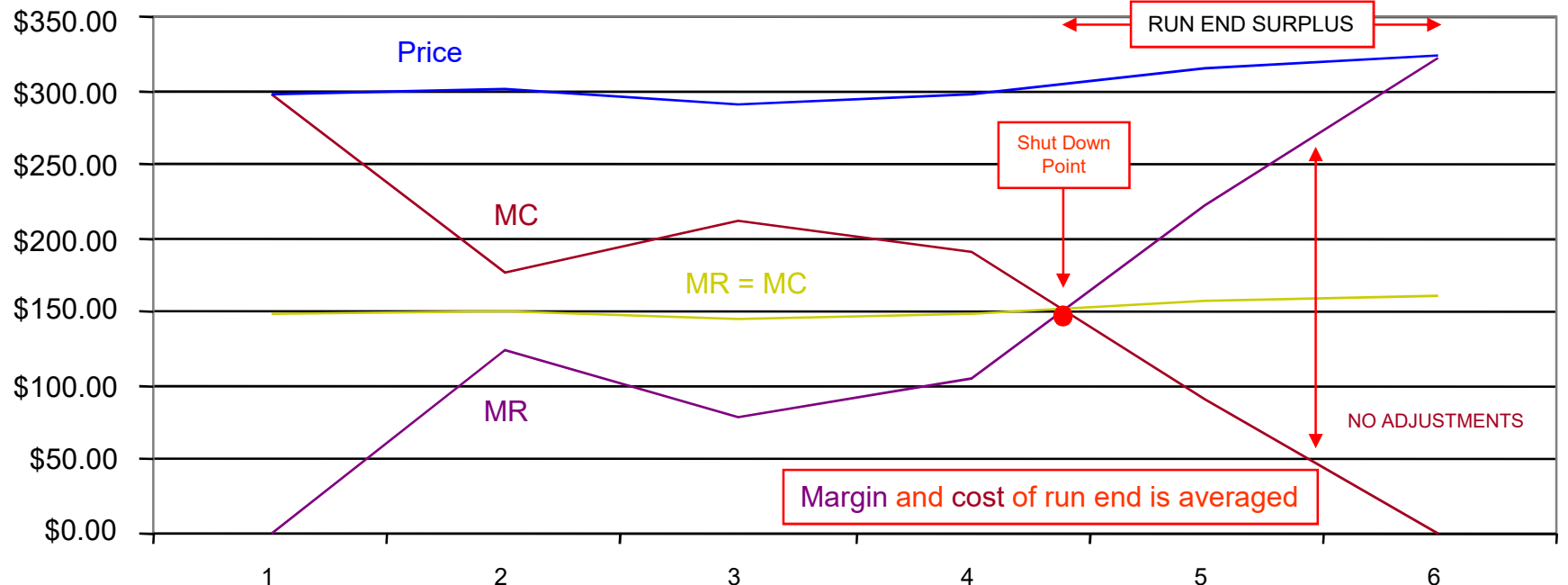
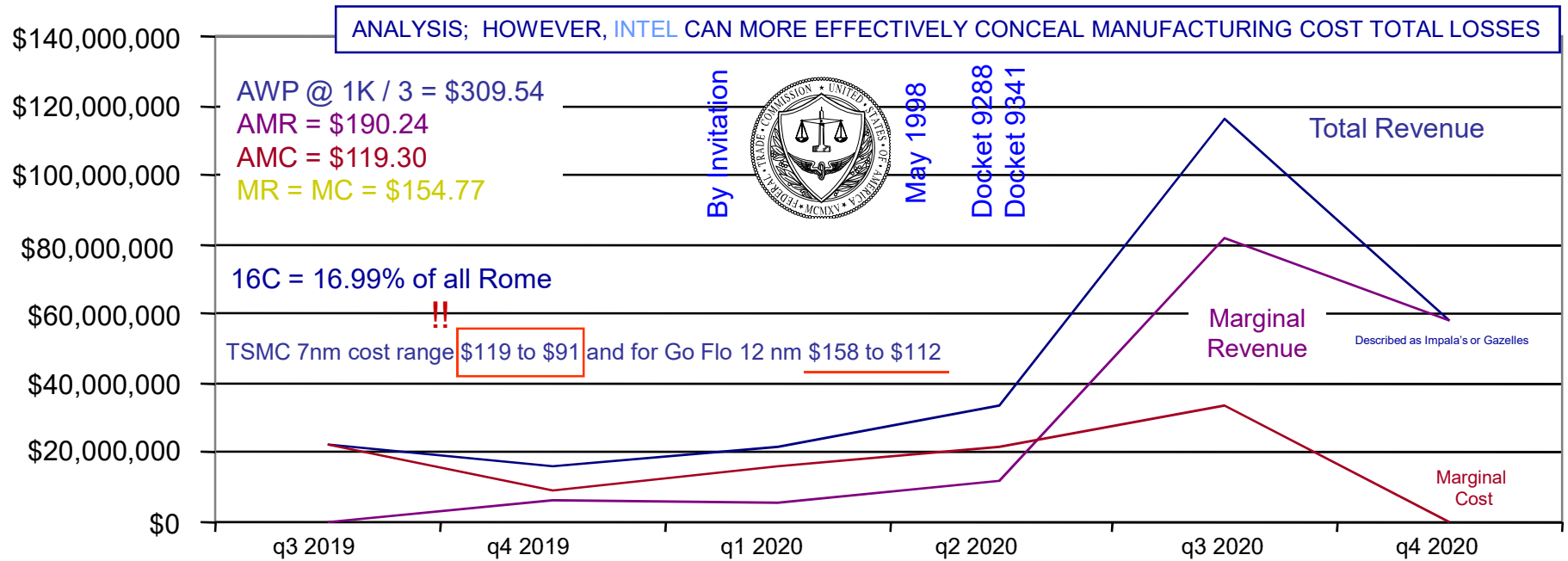
Camp Marketing Consultancy – AMD Rome 32C economics on 10K & channel \$ profit max



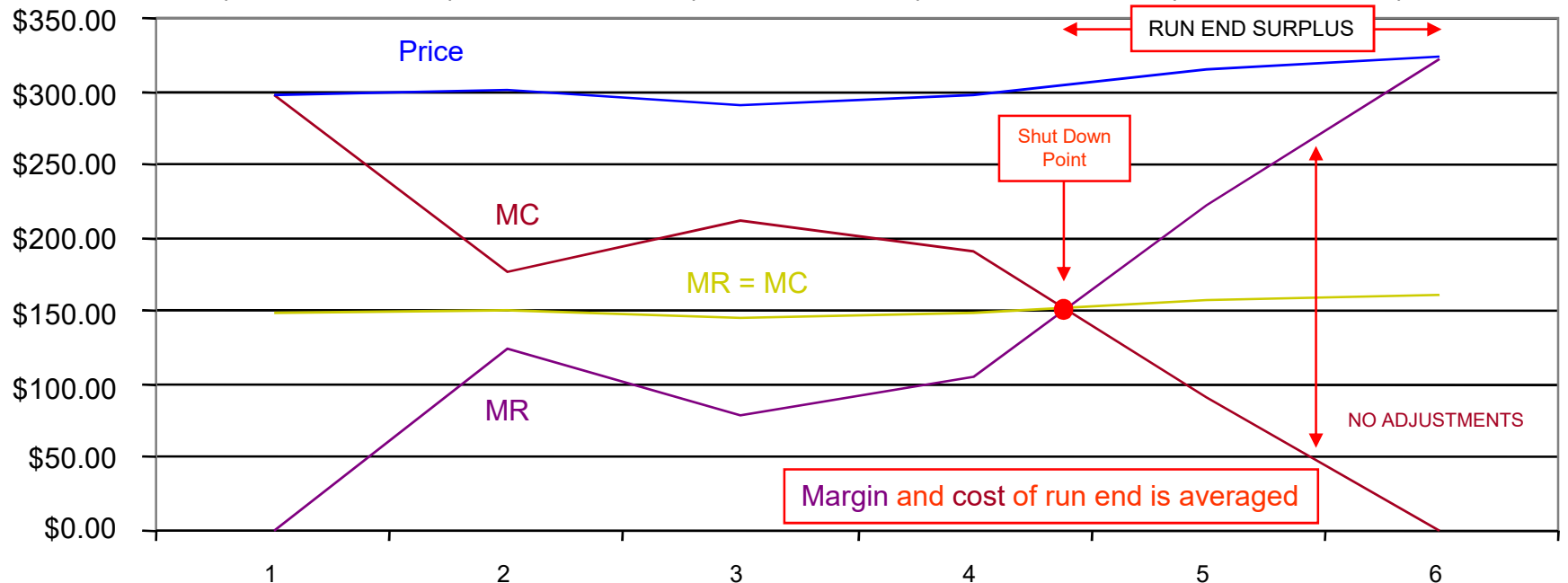
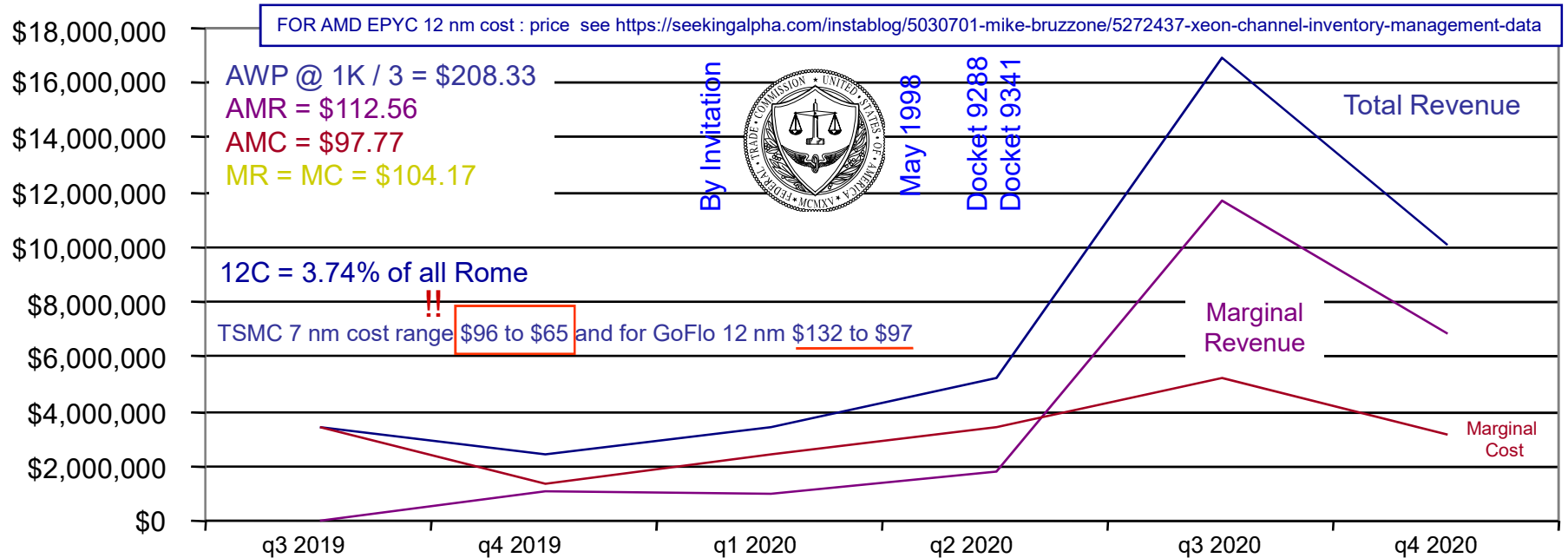
Camp Marketing Consultancy – AMD Rome 24C economics on 10K & channel \$ profit max



Camp Marketing Consultancy – AMD Rome 16C economics on 10K & channel \$ profit max

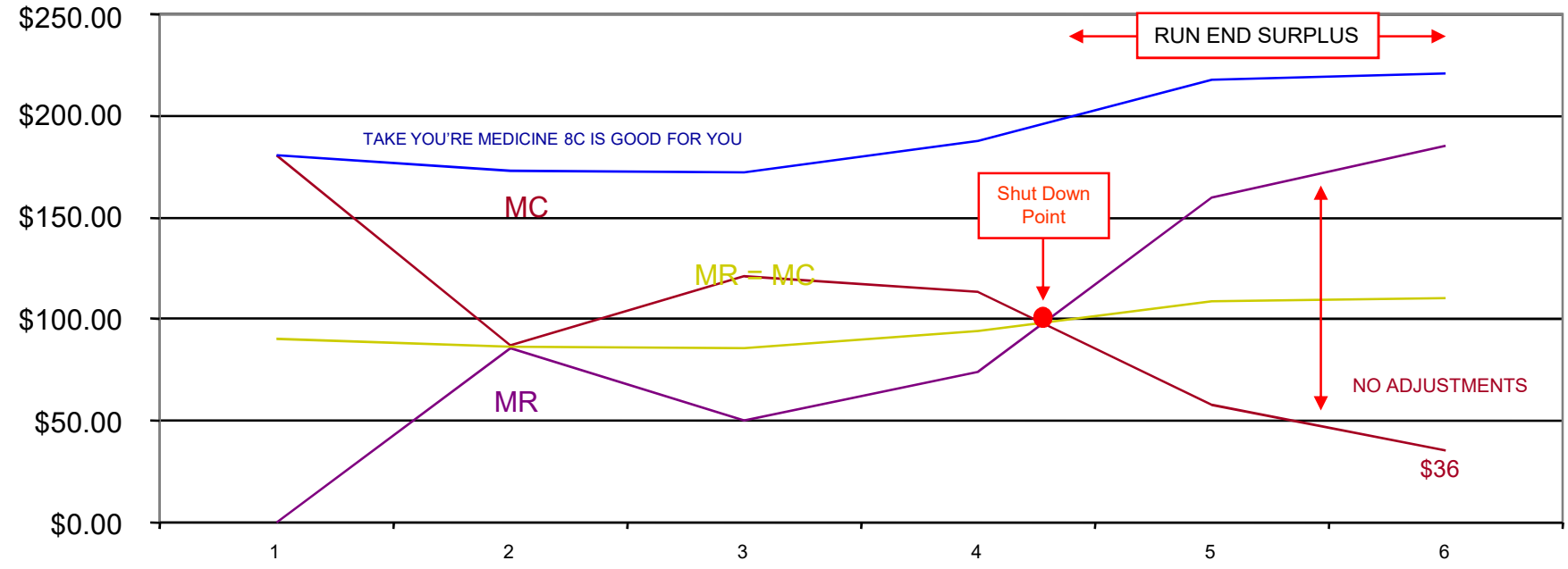
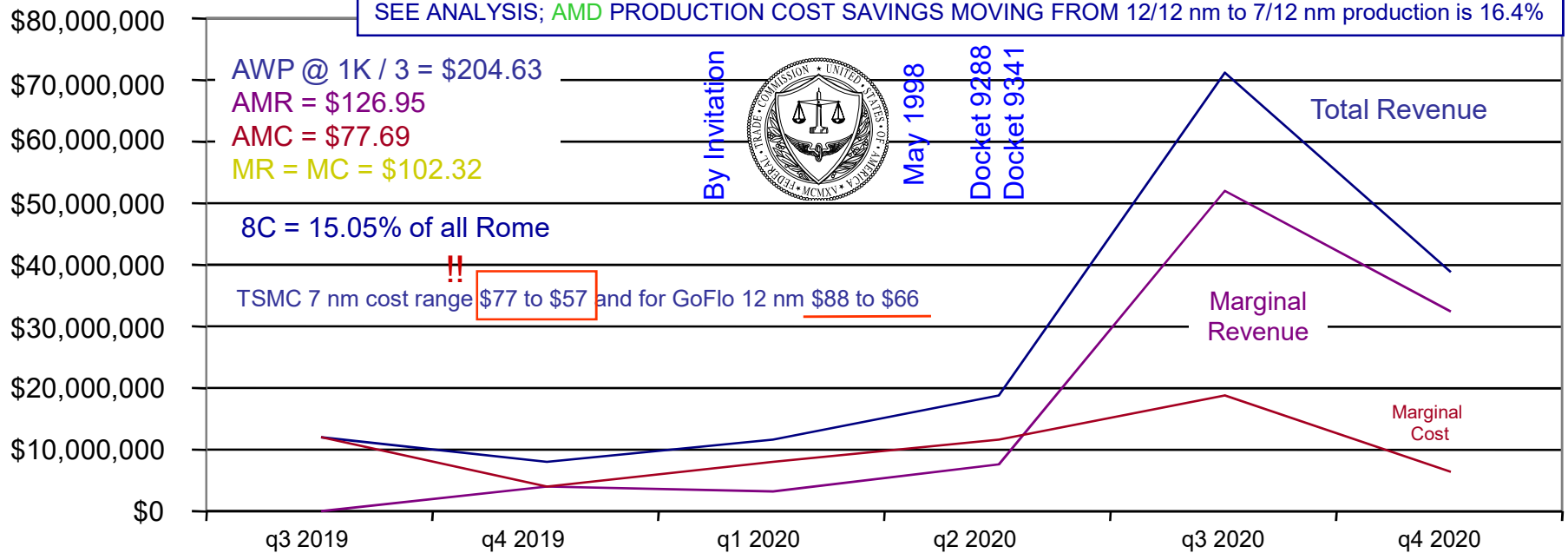


Camp Marketing Consultancy – AMD Rome 12C economics on 10K & channel \$ profit max

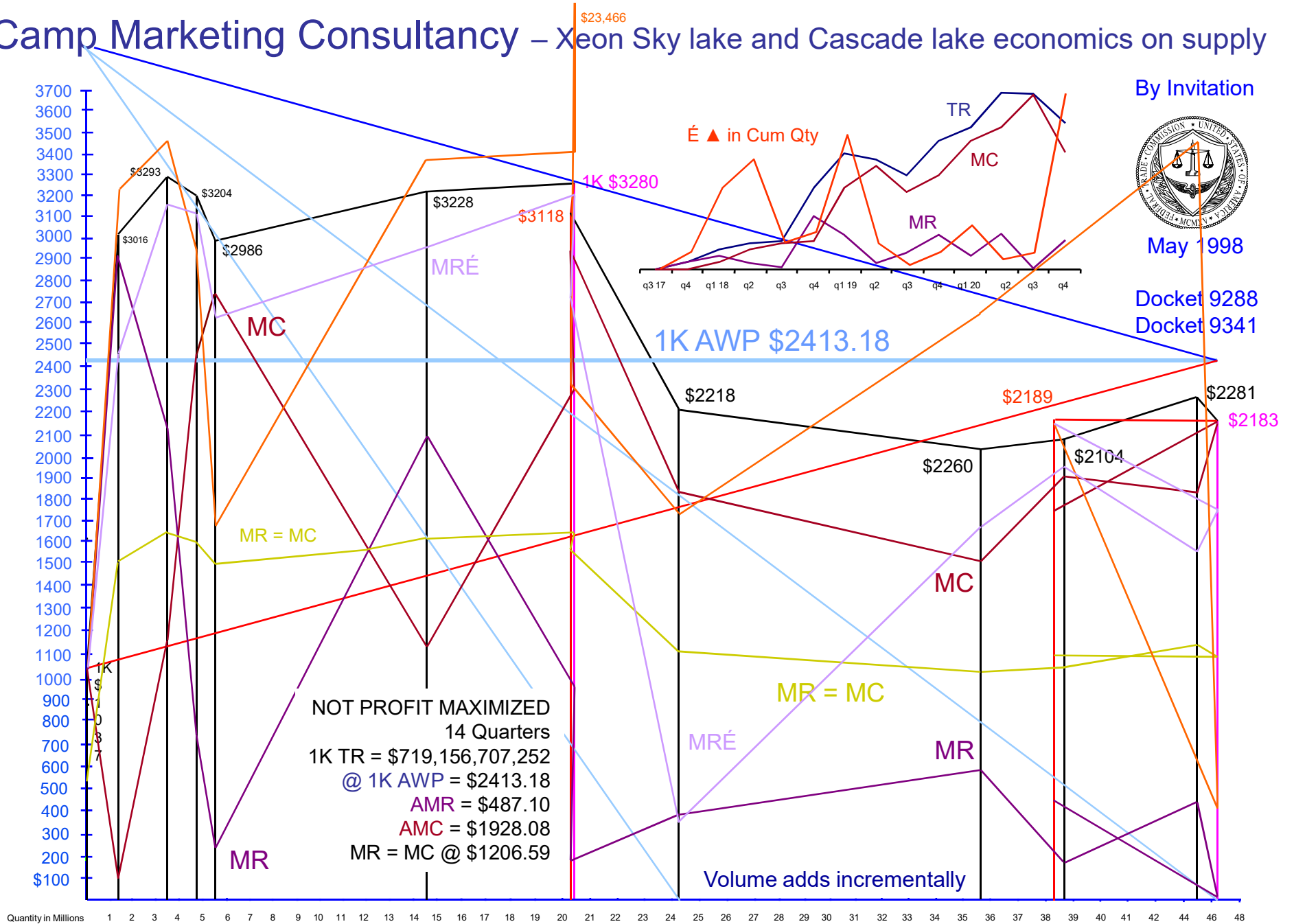


Camp Marketing Consultancy – AMD Rome 8C economics on 10K & channel \$ profit max

SEE ANALYSIS; AMD PRODUCTION COST SAVINGS MOVING FROM 12/12 nm to 7/12 nm production is 16.4%



Camp Marketing Consultancy – Xeon Sky lake and Cascade lake economics on supply



Camp Marketing Consultancy – XSL/XCL price at discount on financial reconciliation

298,012,141 units through December
 Gross = \$109,312,913,640
 @ 1K < 85% AWP = \$366.81
 AMR = \$161.54
 AMC = \$205.27
 MR = MC @ \$183

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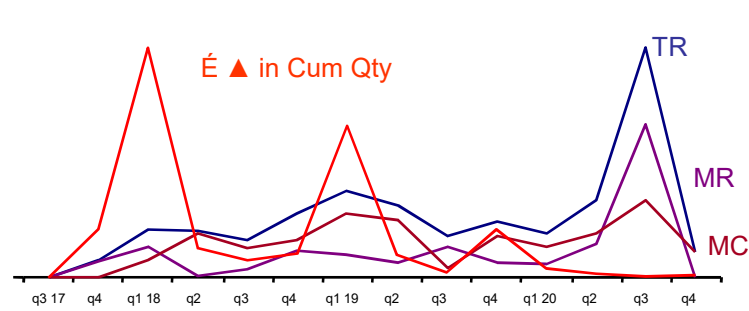
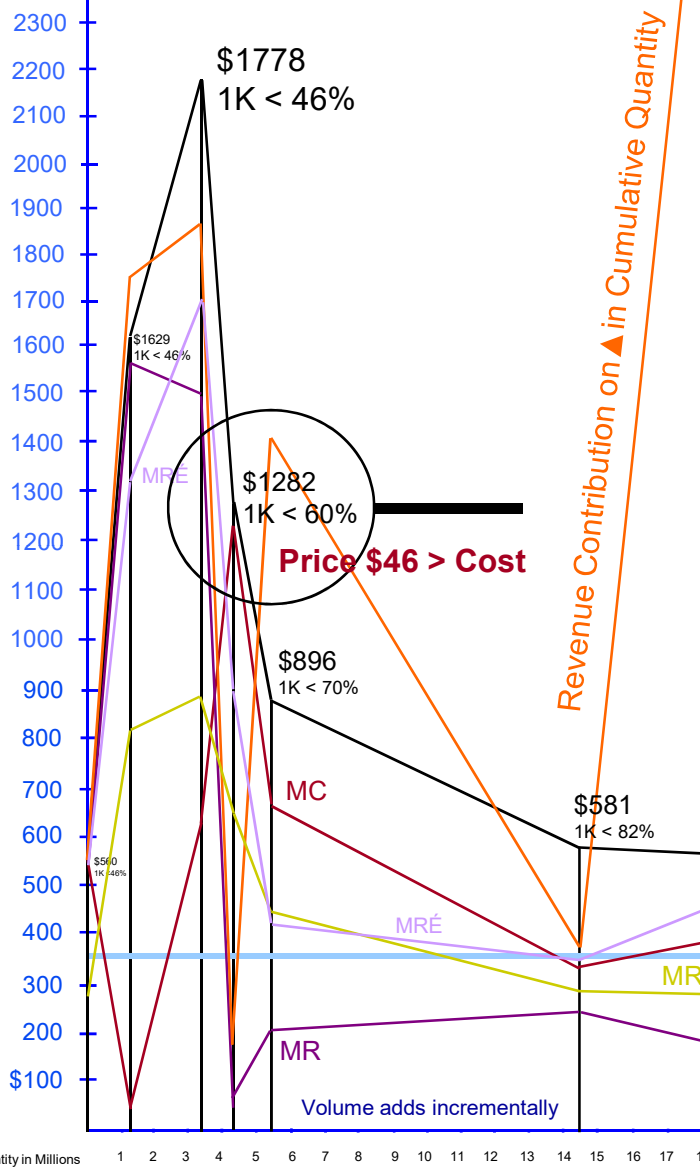


May 1998

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Industry recoverable on Areeda Turner P < C
 \$1,677,647,807 in Variable Cost Sales \$44 each q3 2020

Price toll bridge collapses . . .



Report Period	DCG Stated Revenue	Scalable Gross on Analysis
q4 2020	\$4,425,000,000 - \$6.1 B	\$1,677,647,807 potential @ cost sales risk
q3 2020	\$5,900,000,000	\$30,233,385,563
q2 2020	\$7,120,000,000	\$10,146,633,371
q1 2020	\$6,900,000,000	\$5,695,205,950
2019	\$37,100,000,000	\$33,548,829,822
2018	\$37,000,000,000	\$25,721,541,472
q4 2017	\$5,600,000,000	\$2,216,081,086
q3 2017	\$4,900,000,000	\$73,588,569
	\$108,945,000,000	\$109,312,913,640

economics within 0.003%

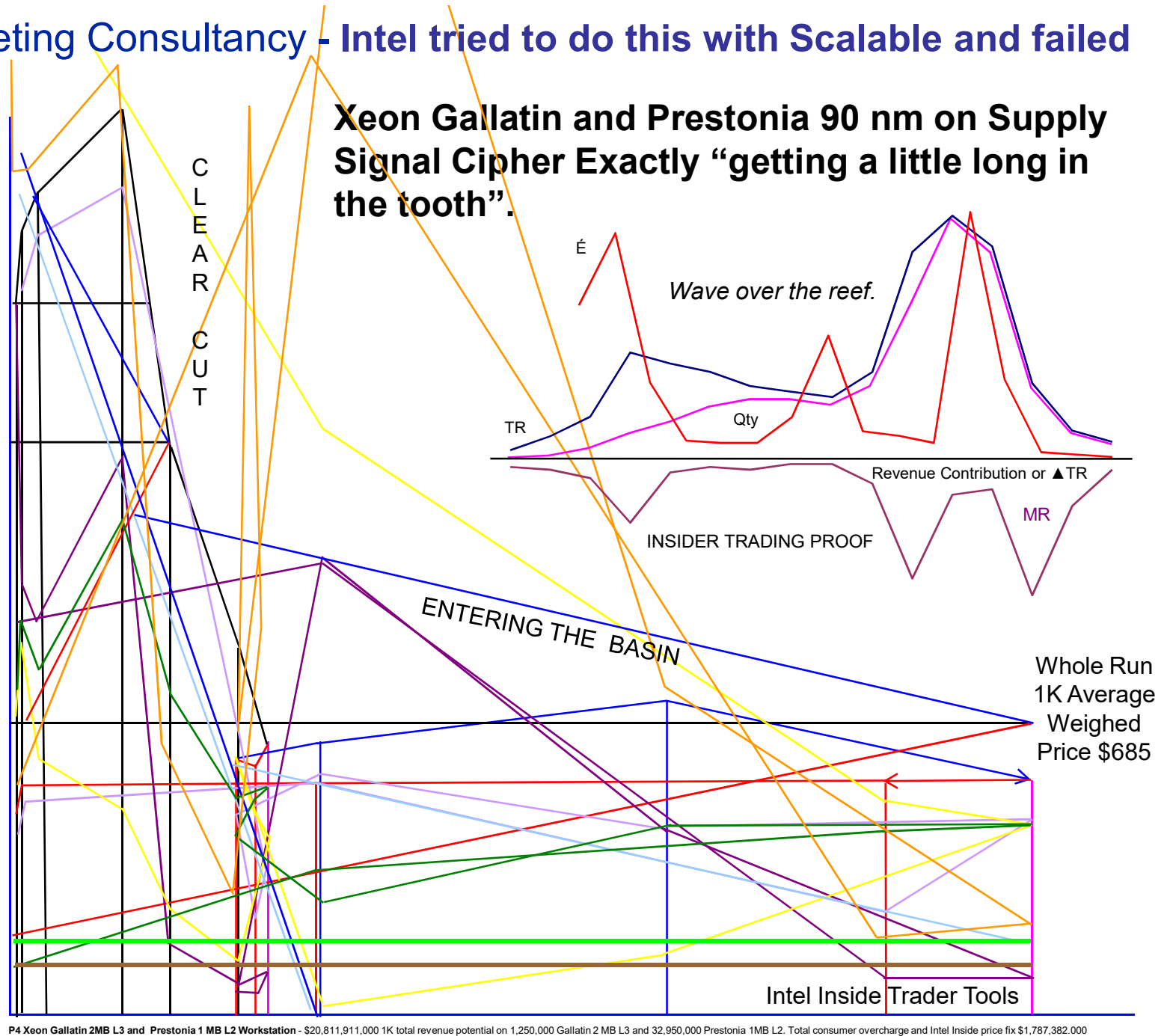
Where's the money
 SEE SLIDE 19
 \$23 billion discrepancy
 2020 annual. No doubt
 some allocated to q4.

1K < 85% average discount P = \$367

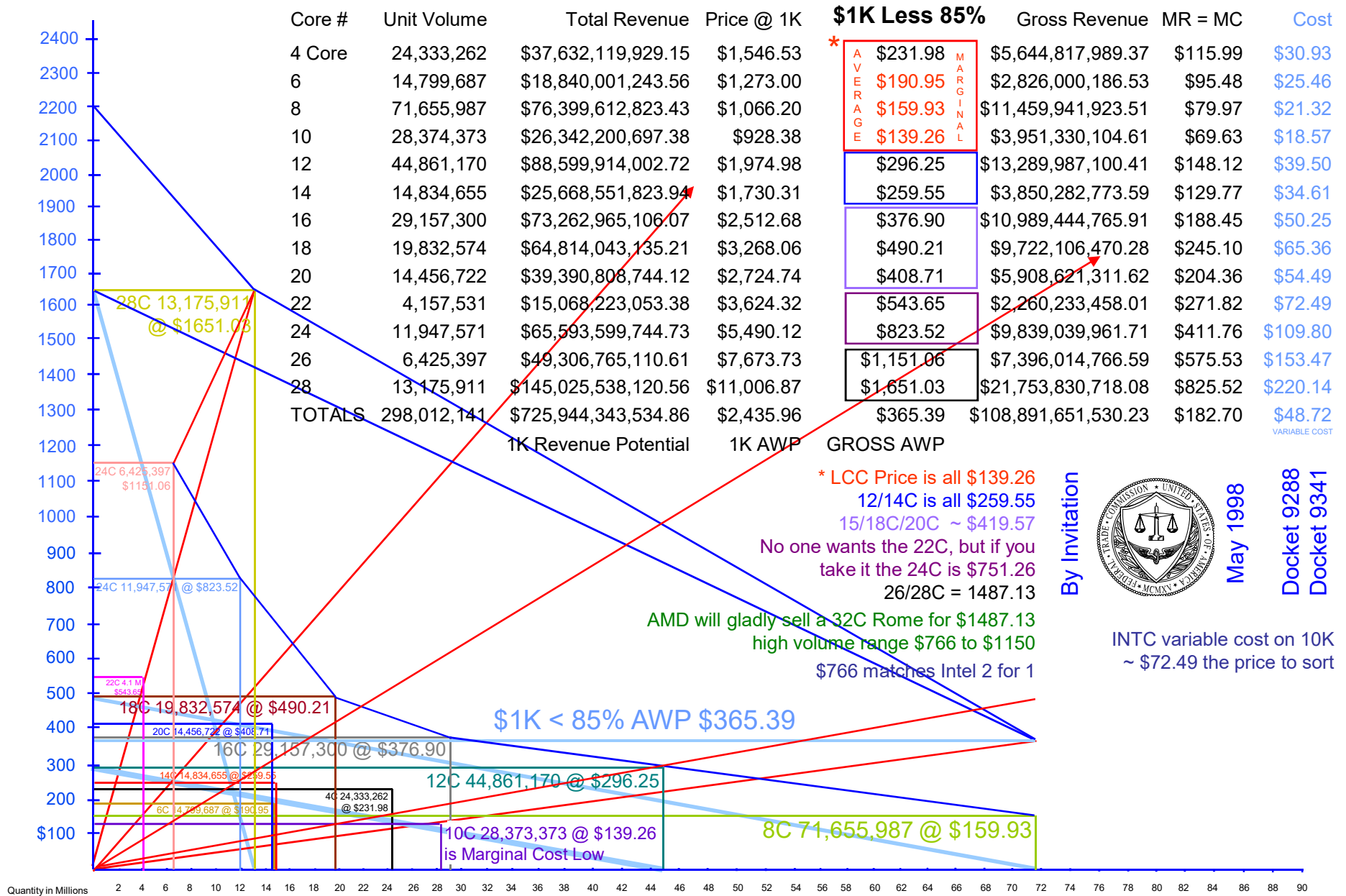
Q4 2020 DCG SHUTS DOWN FOR MAINTENANCE AND RE-TOOLING

Camp Marketing Consultancy - Intel tried to do this with Scalable and failed

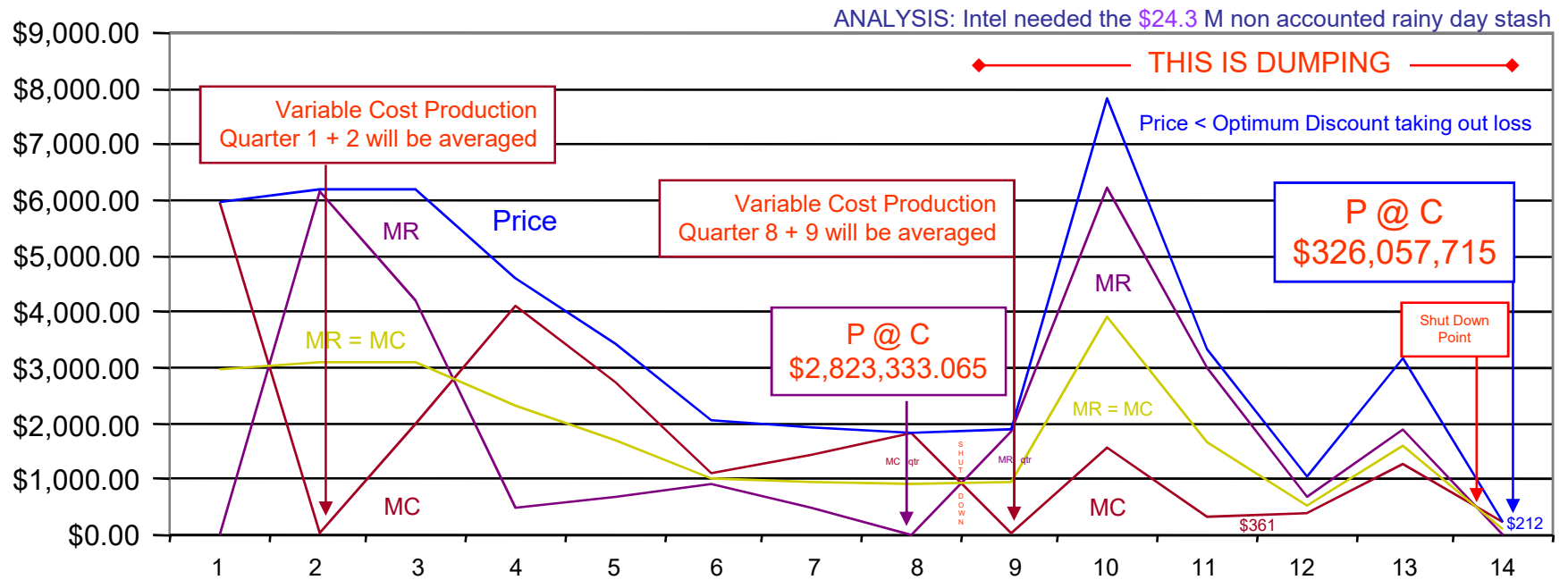
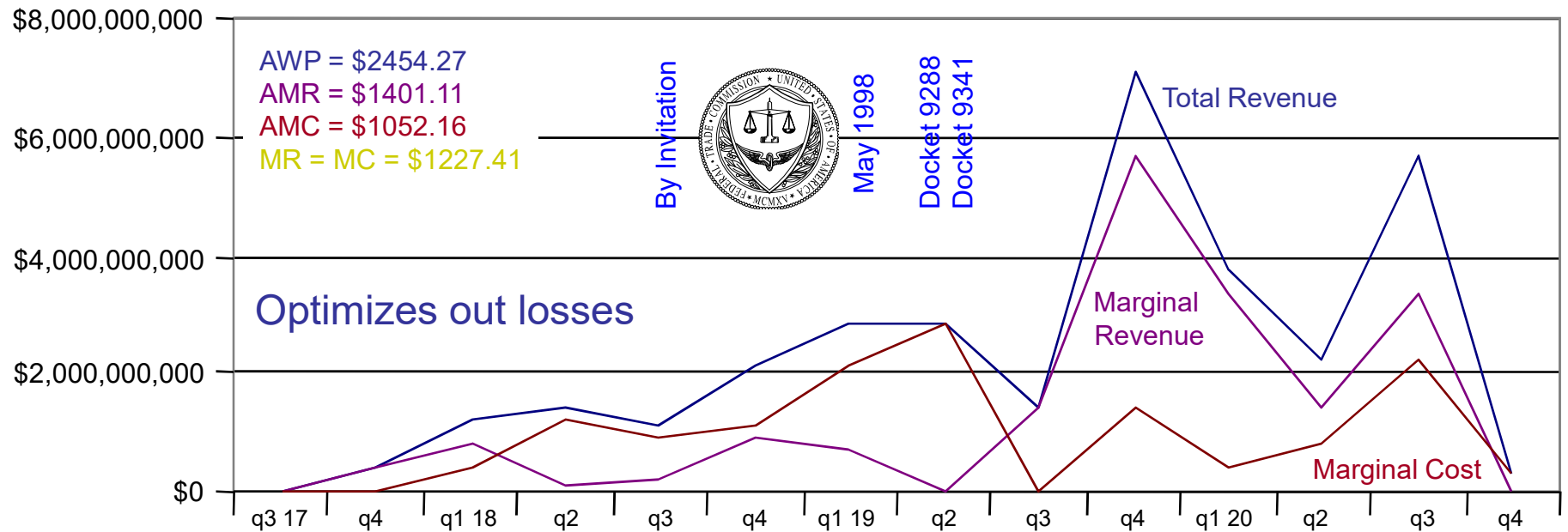
An environment where hard work works the worker out of work, price systems redistribute wealth without regard to worldly virtues, capital accumulation and net worth disappears in deflation, earned interest and pensions evaporate in inflation, where the speculator and manipulator reap the rewards of competitive elimination through forms of monopoly economic theft that tends to shift an industrial market's relative values. Camp Marketing Consultancy for Federal Trade Commission, Senate Edition, January 2003



Camp Marketing Consultancy – Xeon Sky lake and Cascade supply on channel by grade SKU

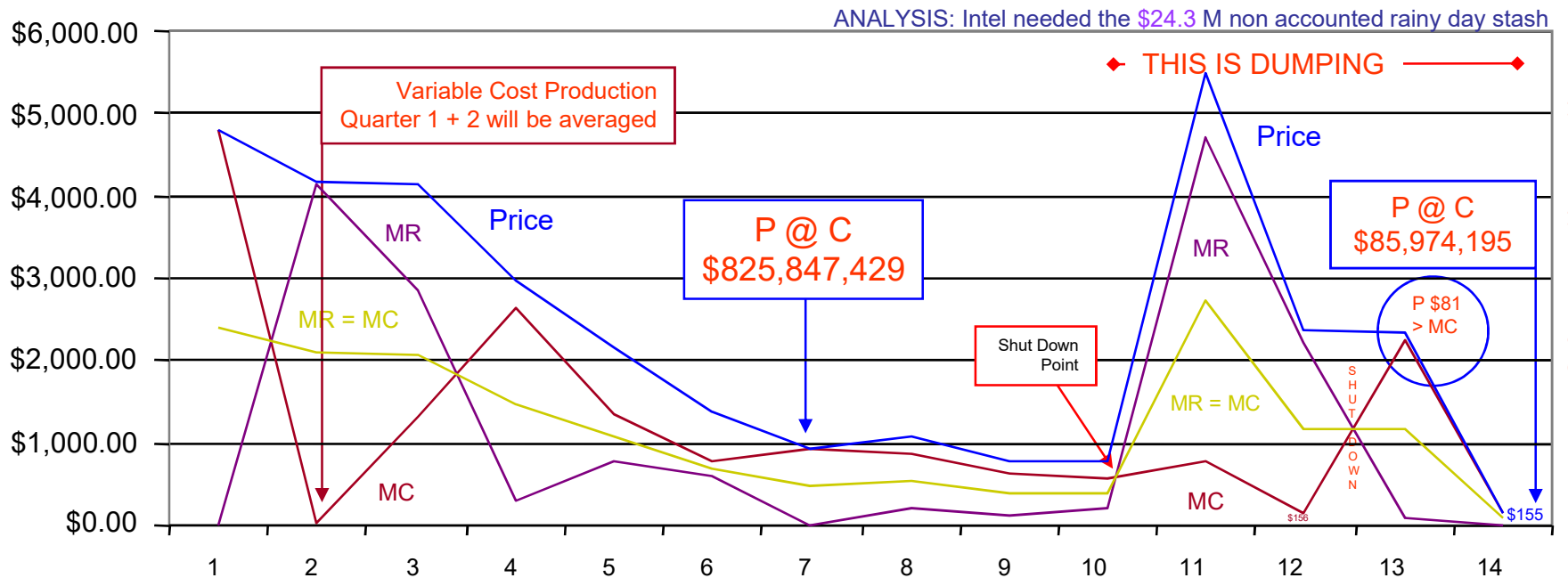
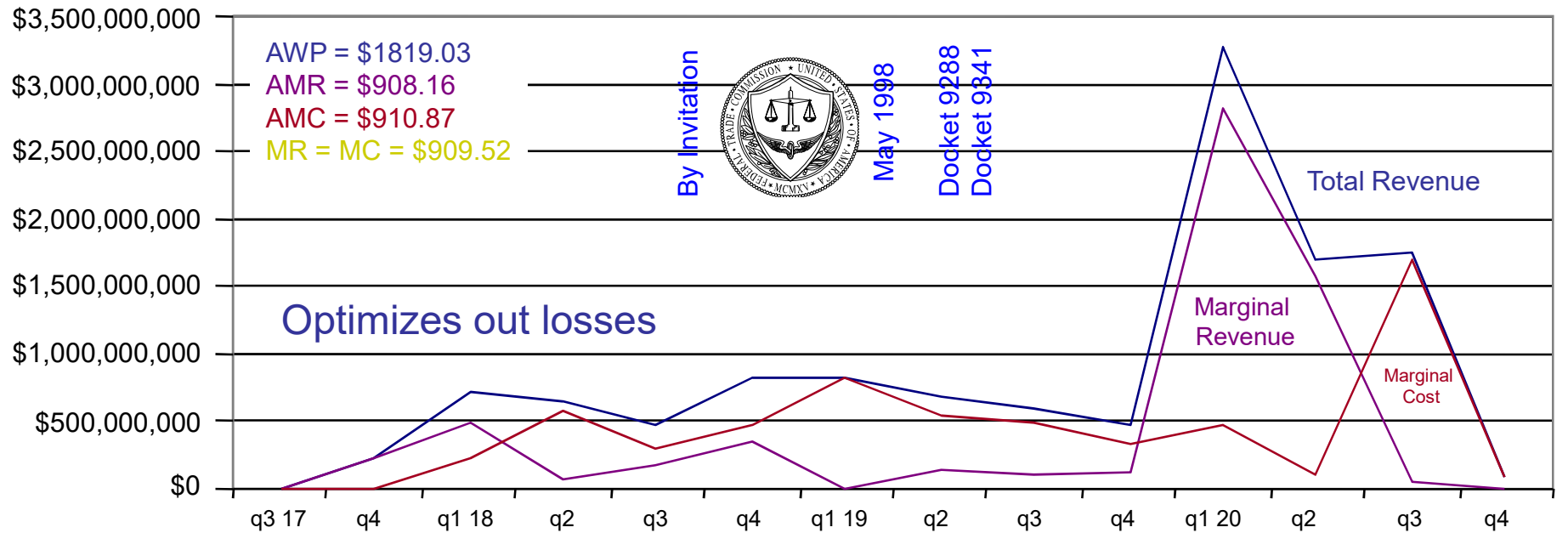


Camp Marketing Consultancy – Xeon Sky lake and Cascade on channel profit maximized 28C



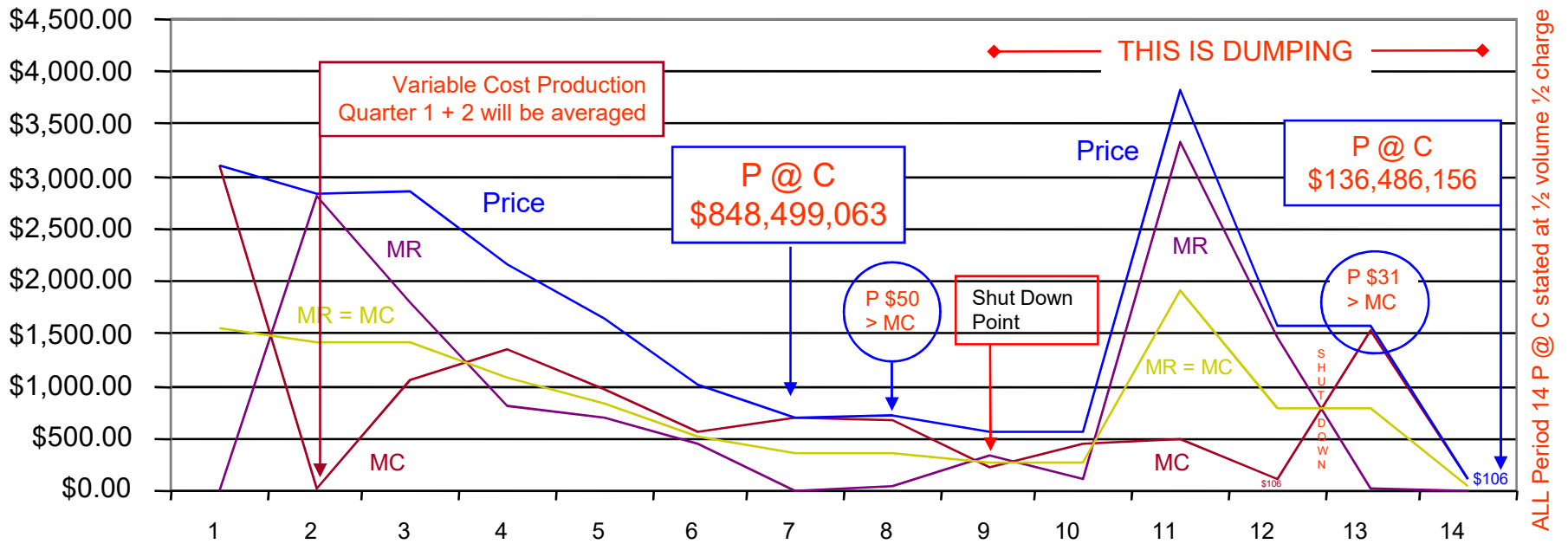
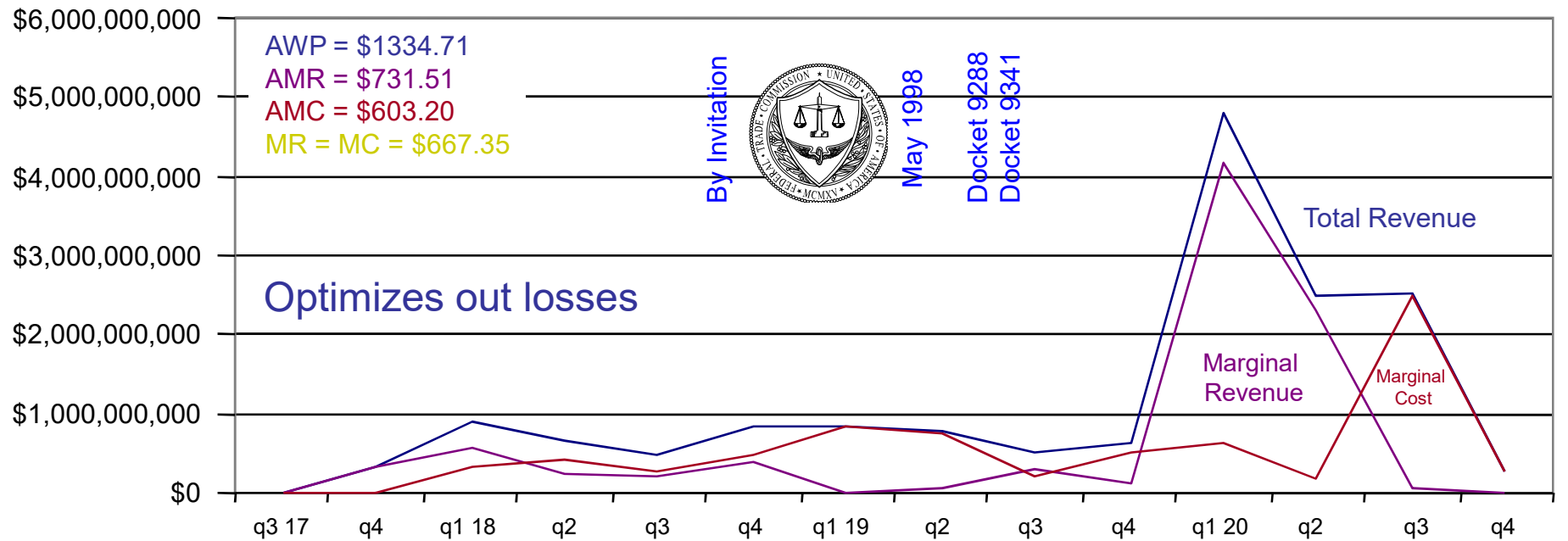
ALL Period 14 P @ C stated at 1/2 volume 1/2 charge

Camp Marketing Consultancy – Xeon Sky lake and Cascade on channel profit maximized 26C

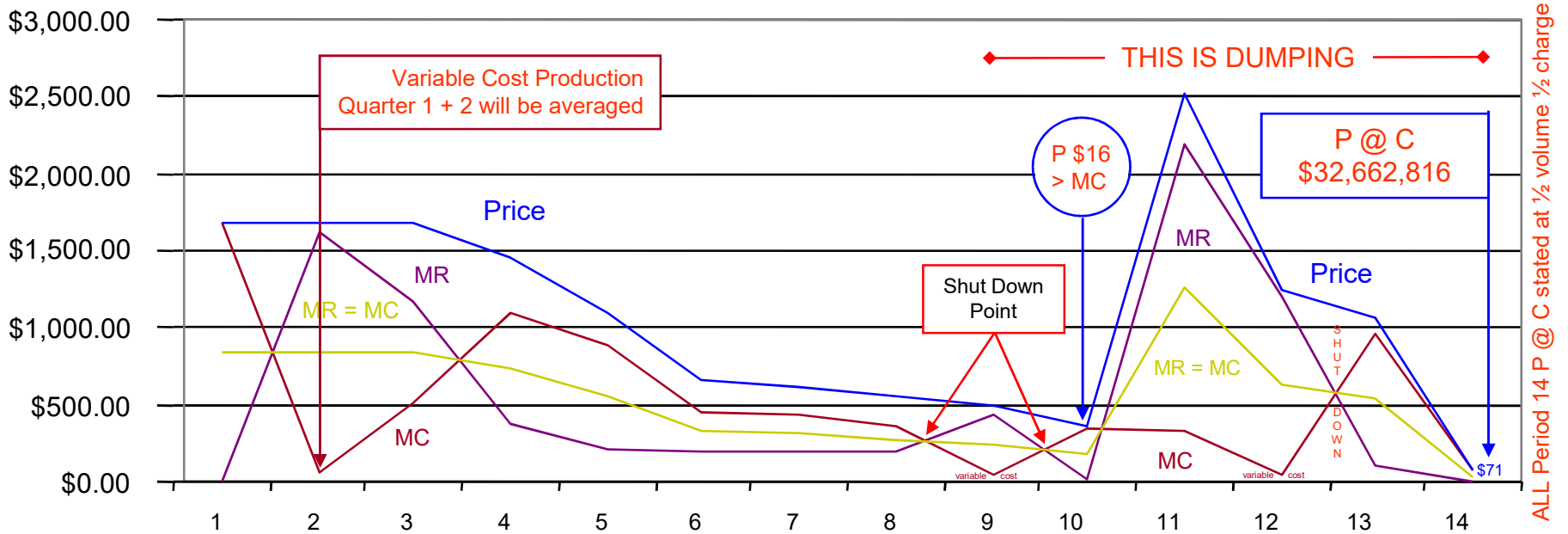
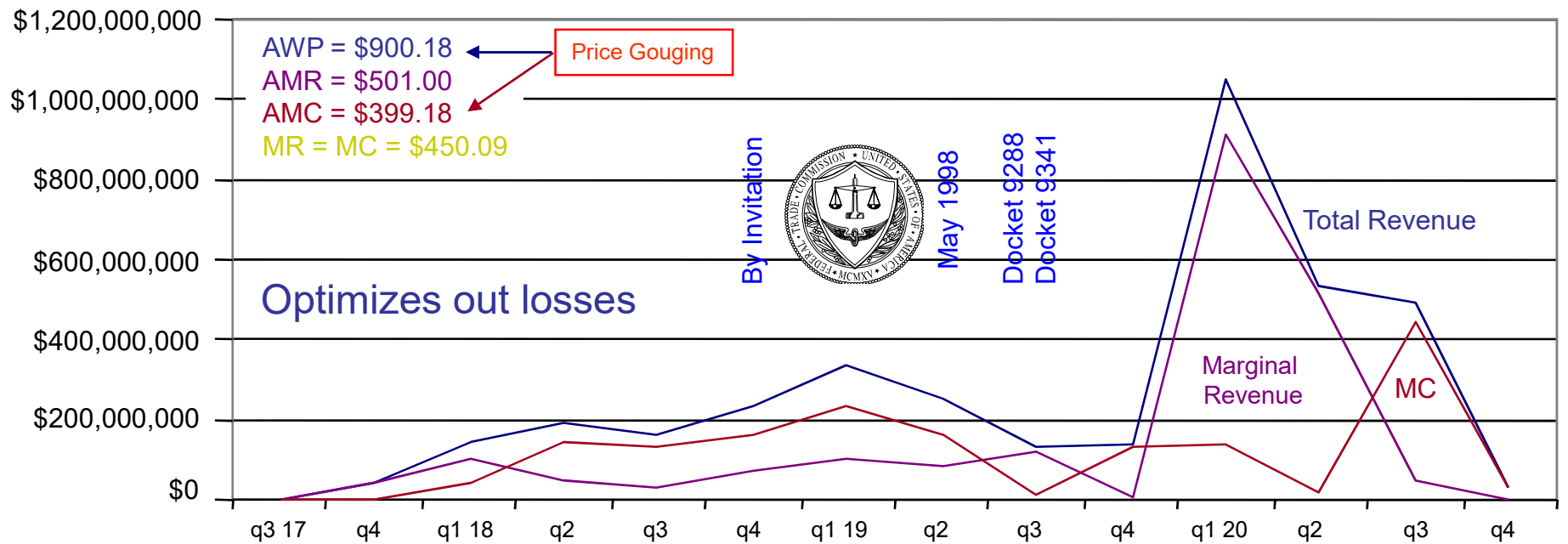


ALL Period 14 P @ C stated at 1/2 volume 1/2 charge

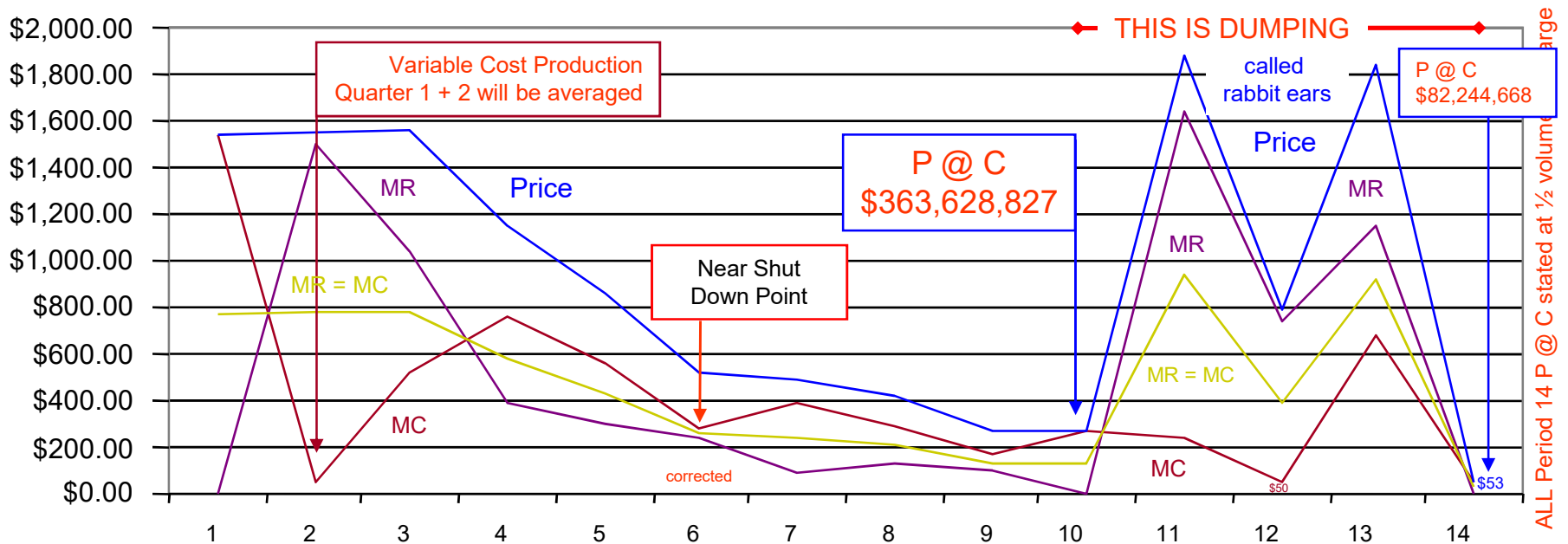
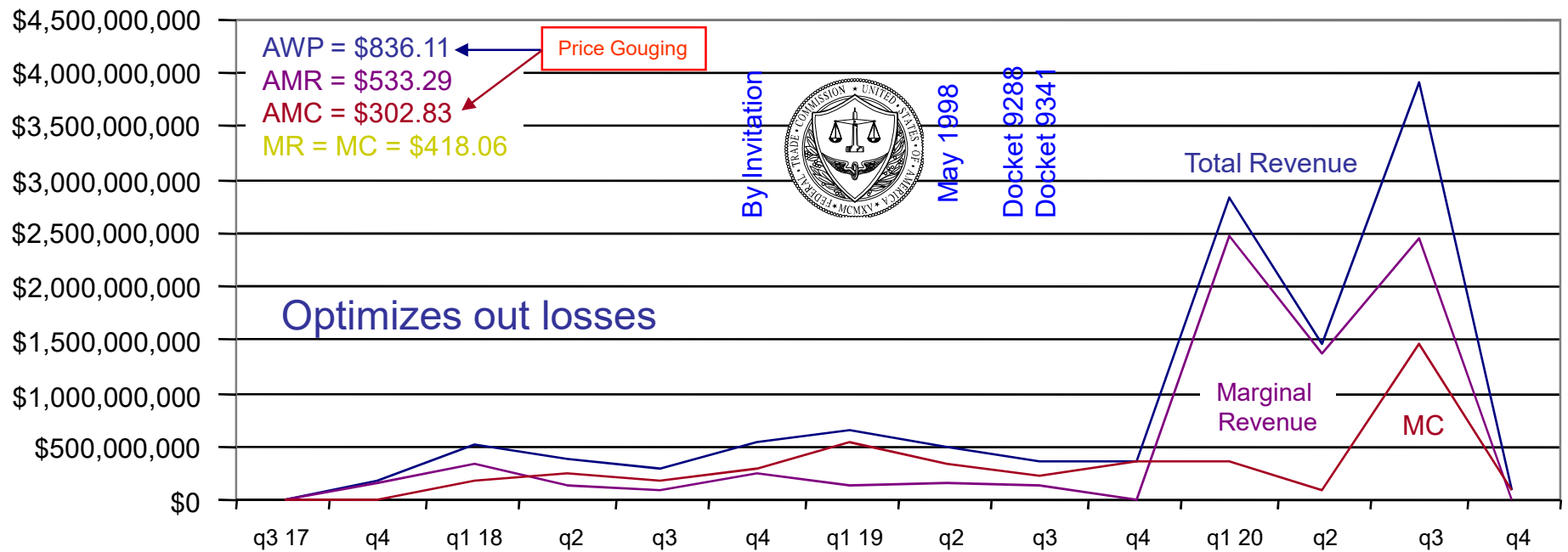
Camp Marketing Consultancy – Xeon Sky lake and Cascade on channel profit maximized 24C



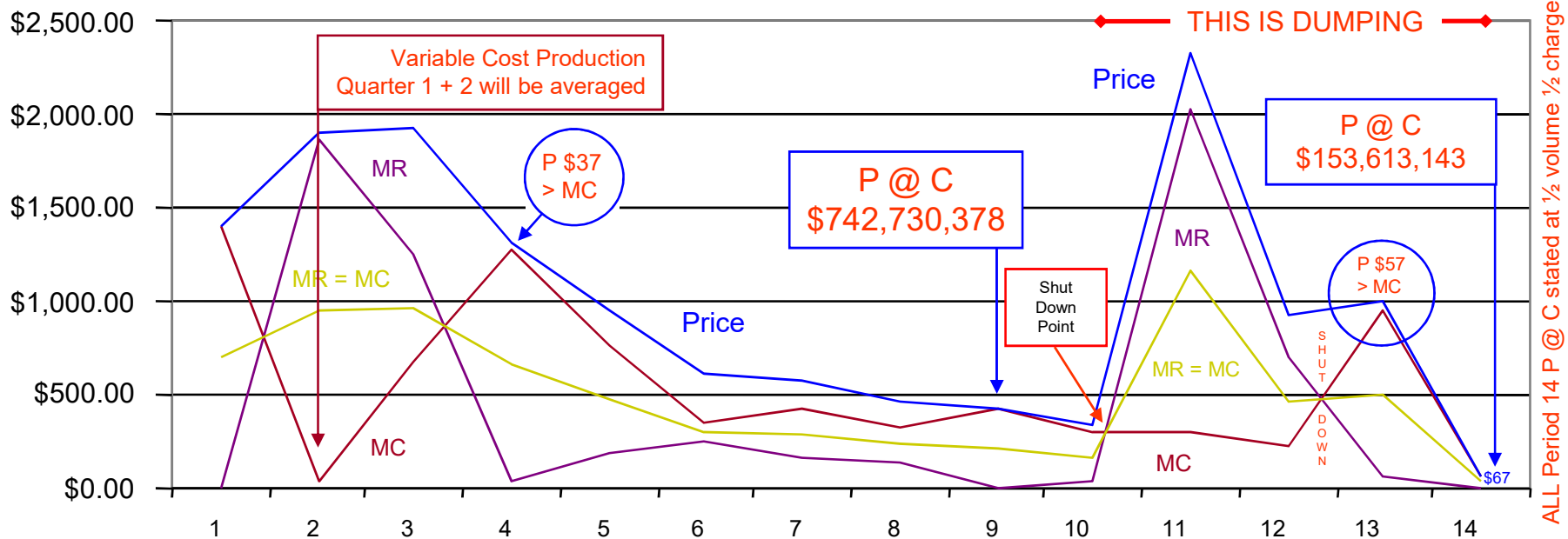
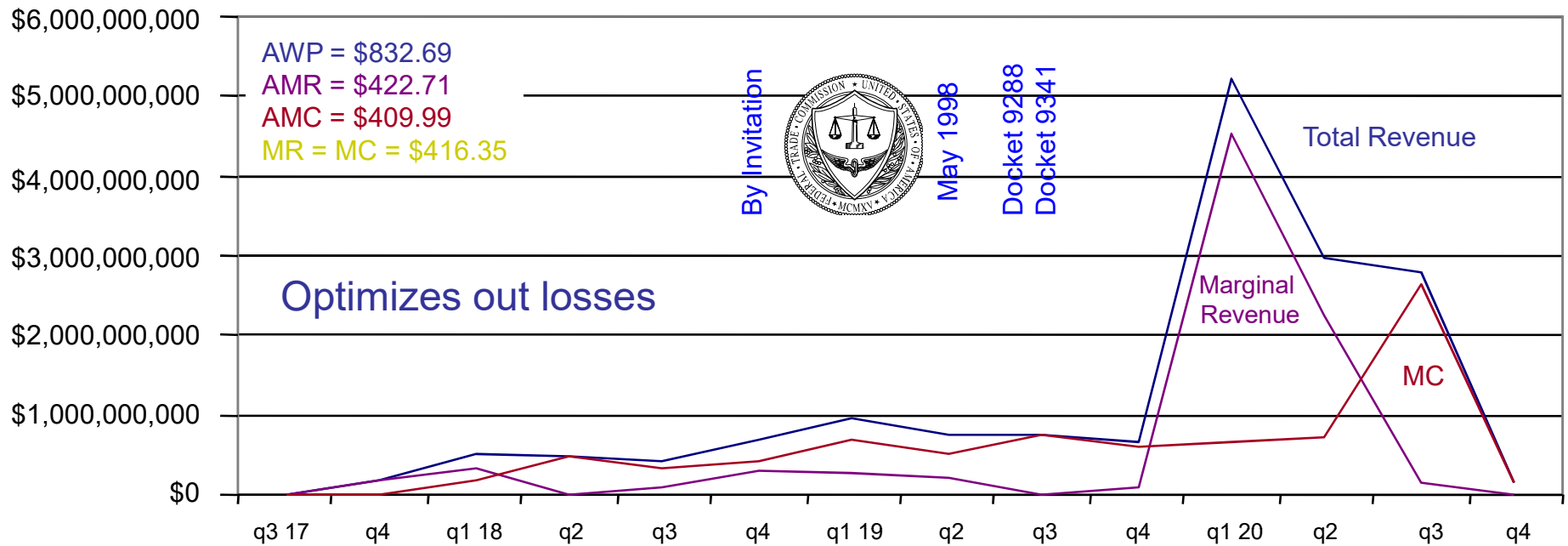
Camp Marketing Consultancy – Xeon Sky lake and Cascade on channel profit maximized 22C



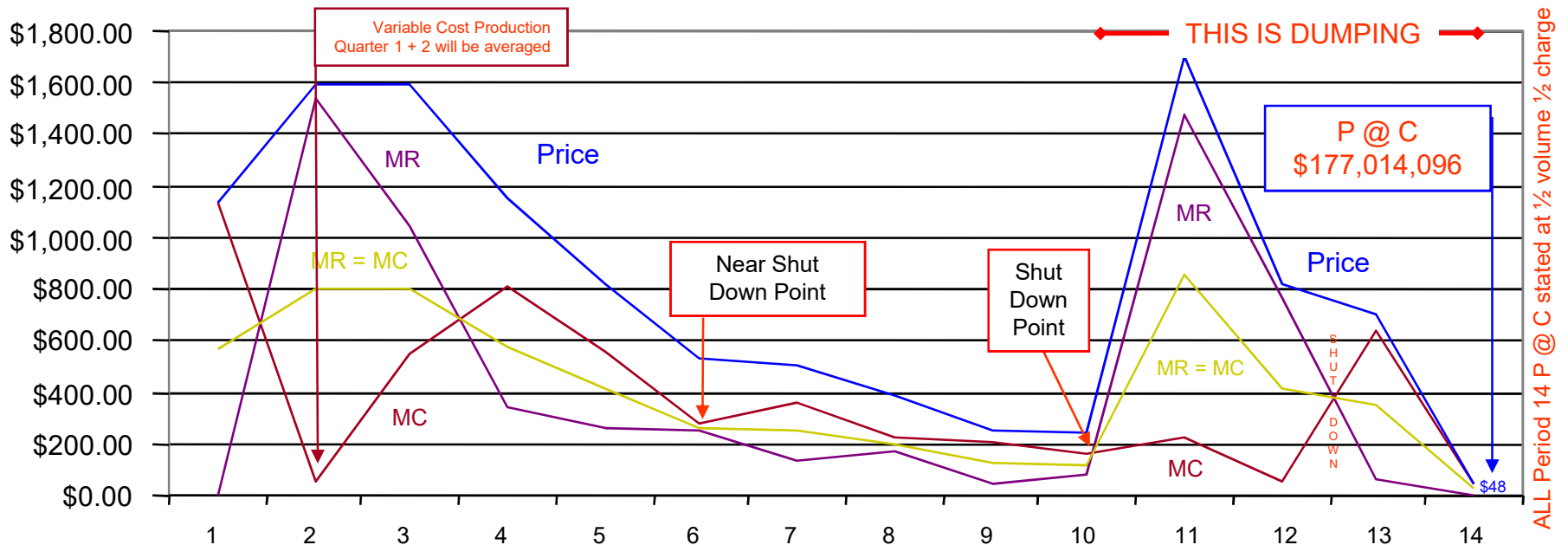
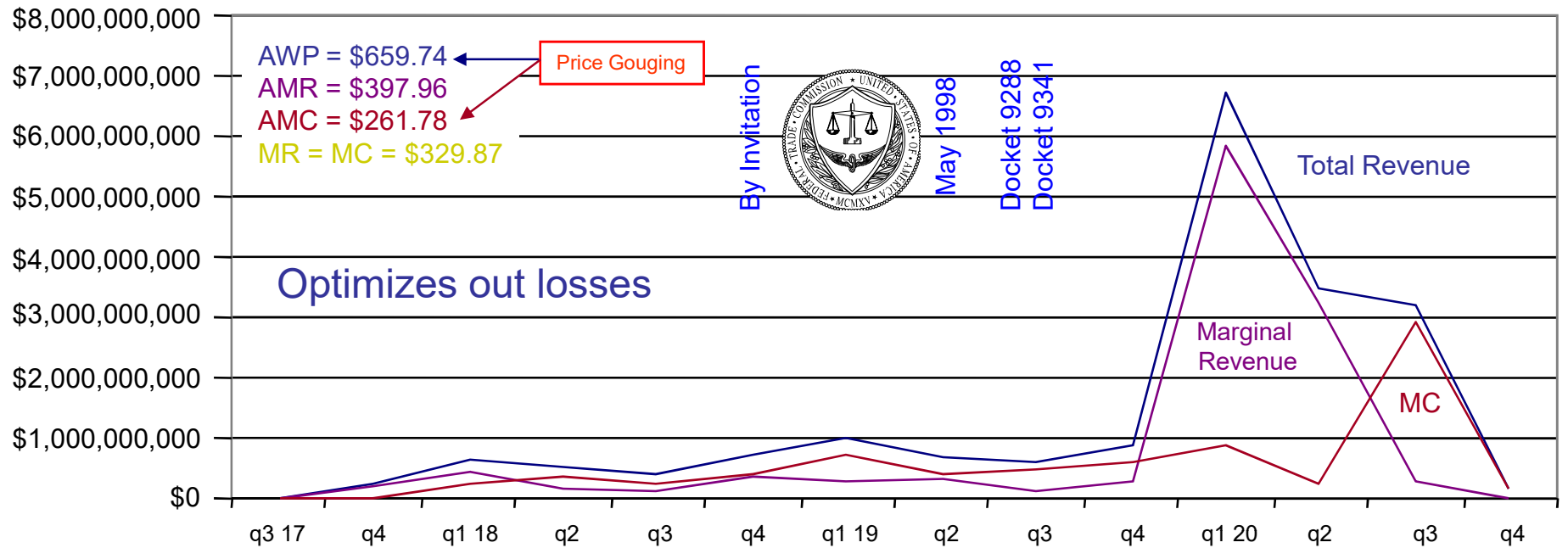
Camp Marketing Consultancy – Xeon Sky lake and Cascade on channel profit maximized 20C



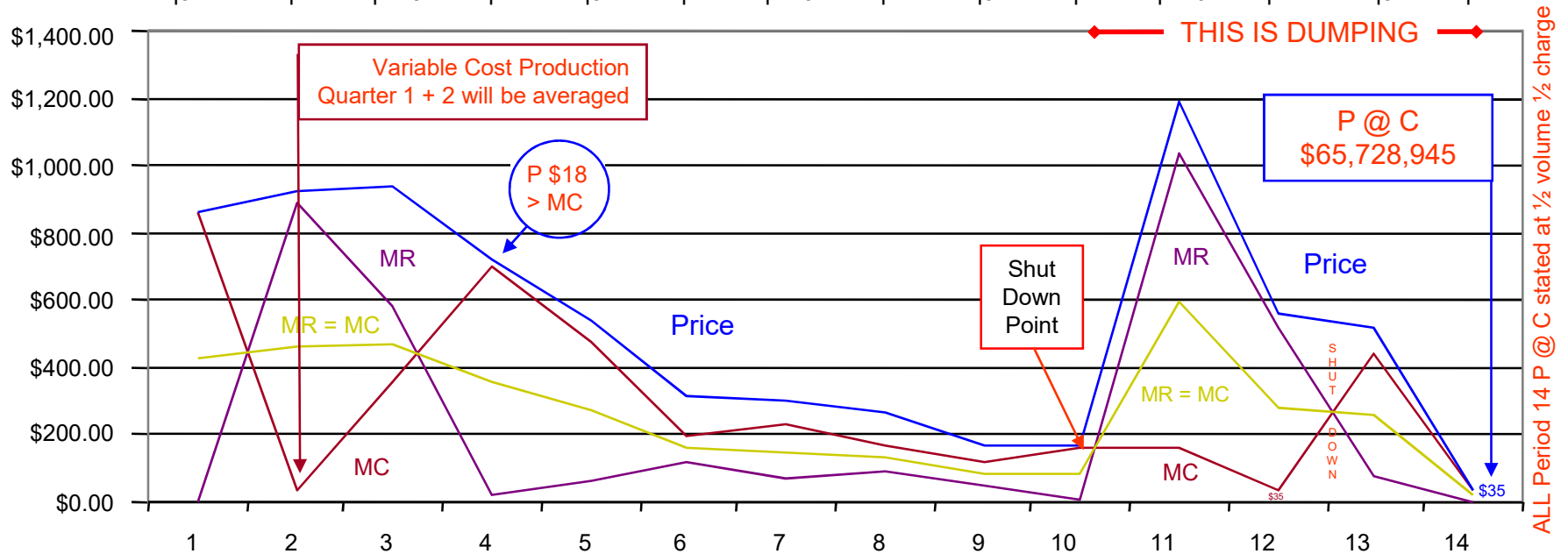
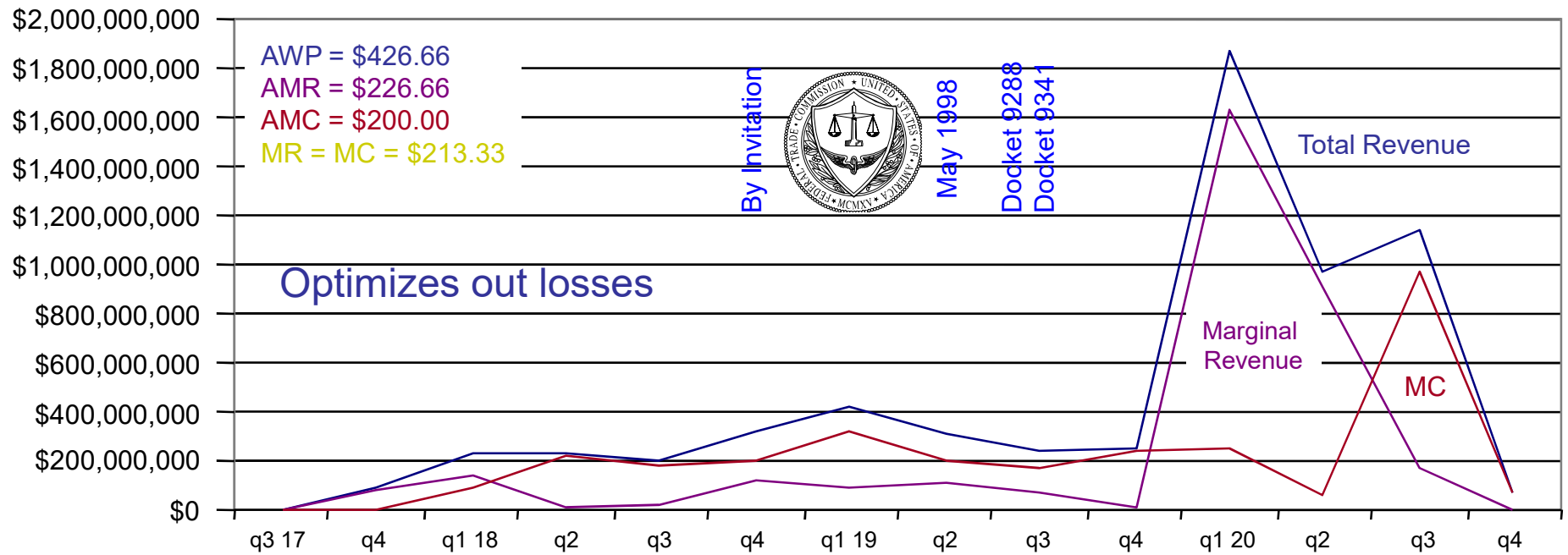
Camp Marketing Consultancy – Xeon Sky lake and Cascade on channel profit maximized 18C



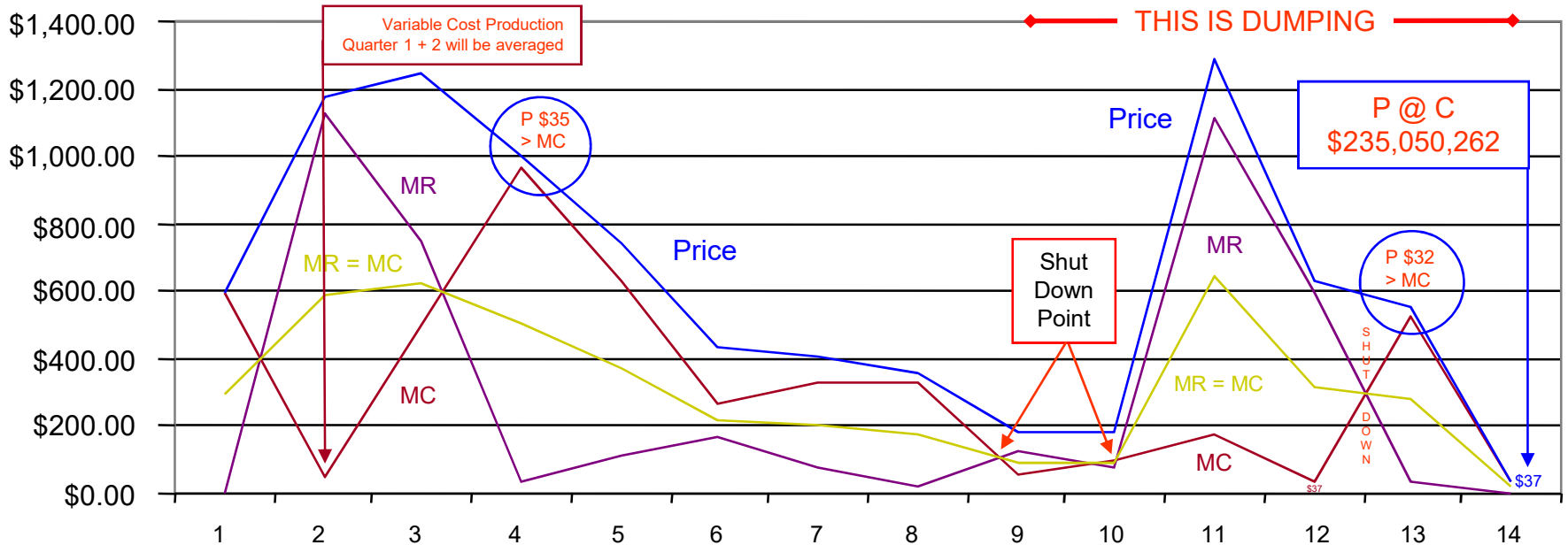
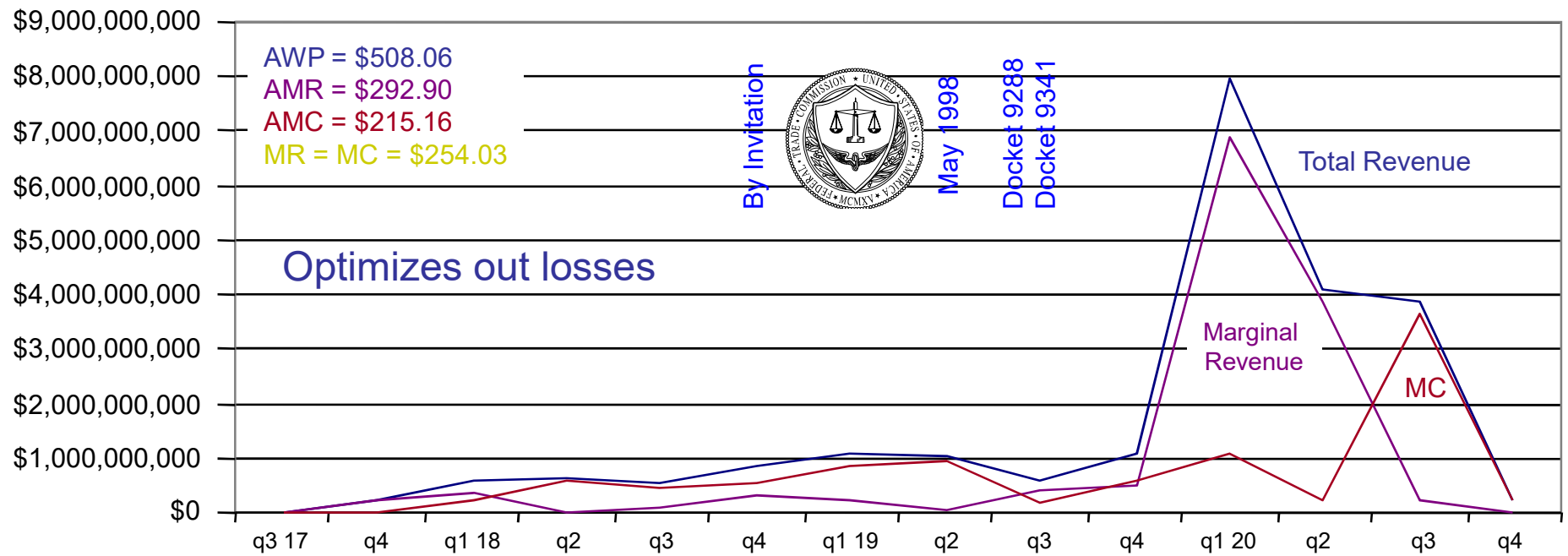
Camp Marketing Consultancy – Xeon Sky lake and Cascade on channel profit maximized 16C



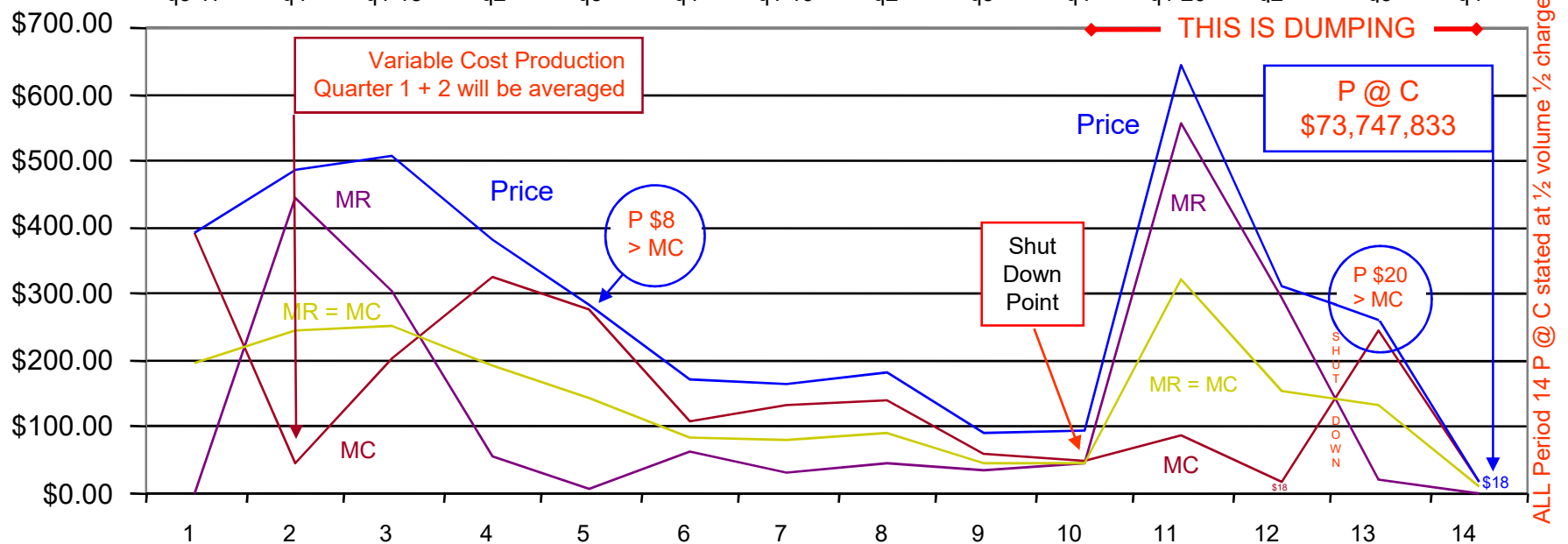
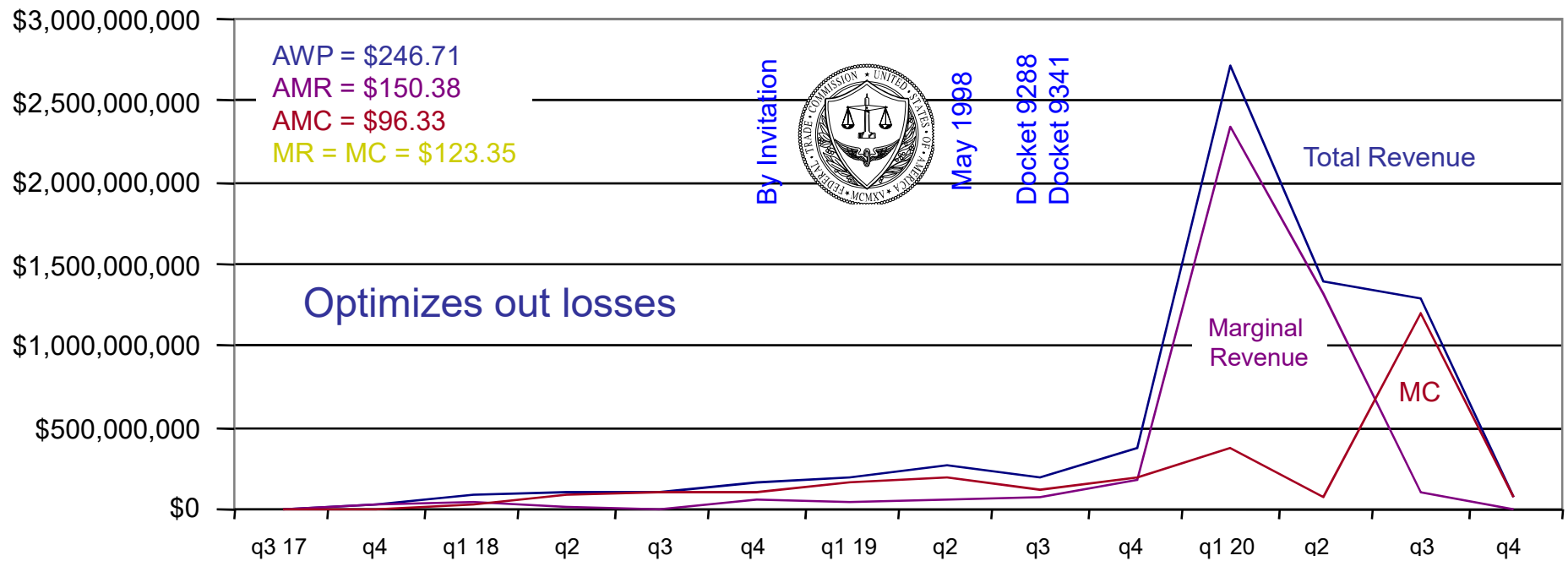
Camp Marketing Consultancy – Xeon Sky lake and Cascade on channel profit maximized 14C



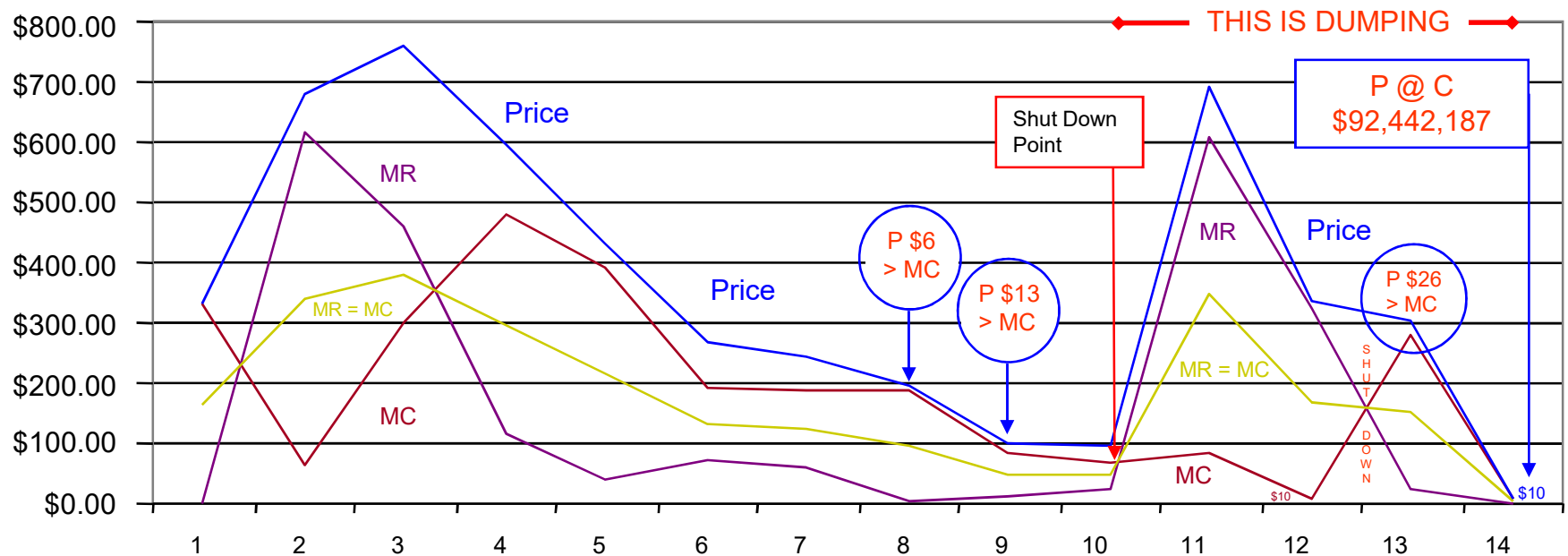
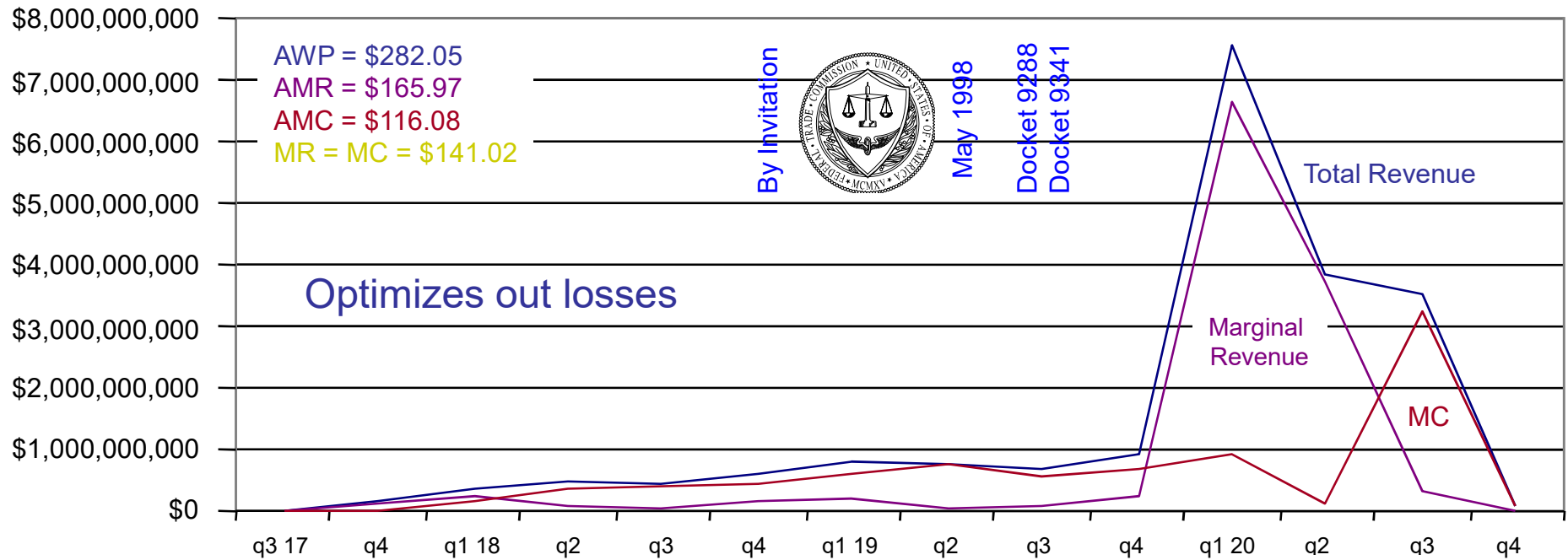
Camp Marketing Consultancy – Xeon Sky lake and Cascade on channel profit maximized 12C



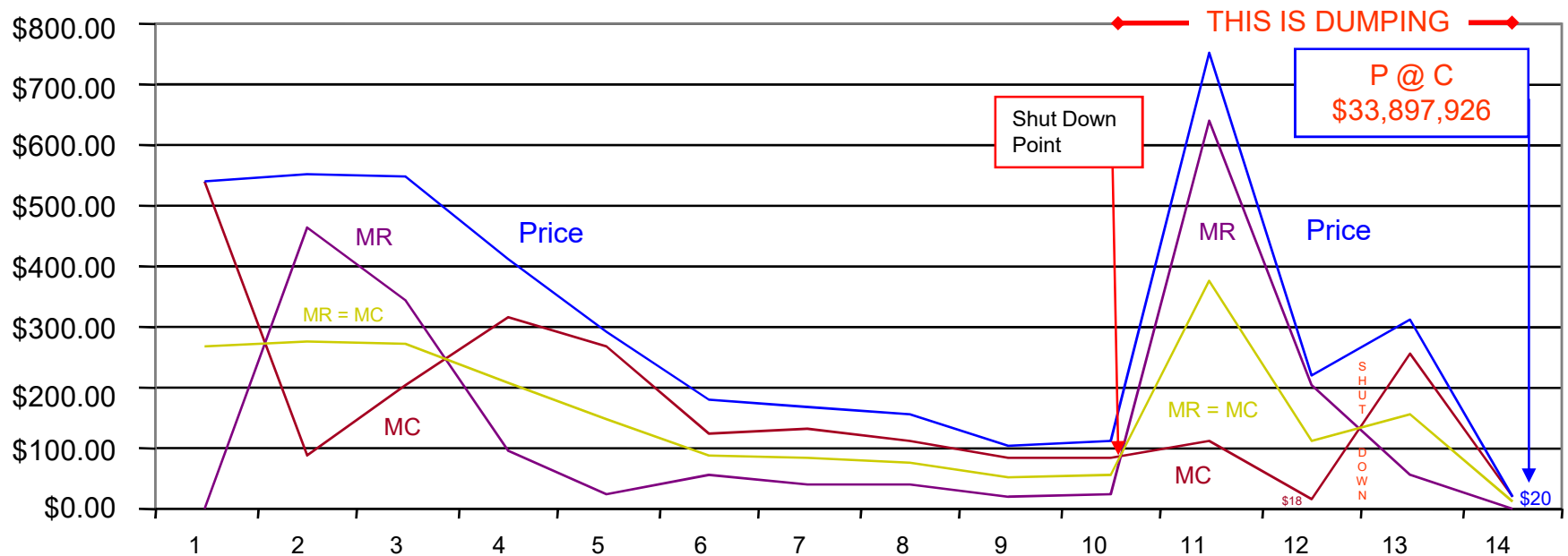
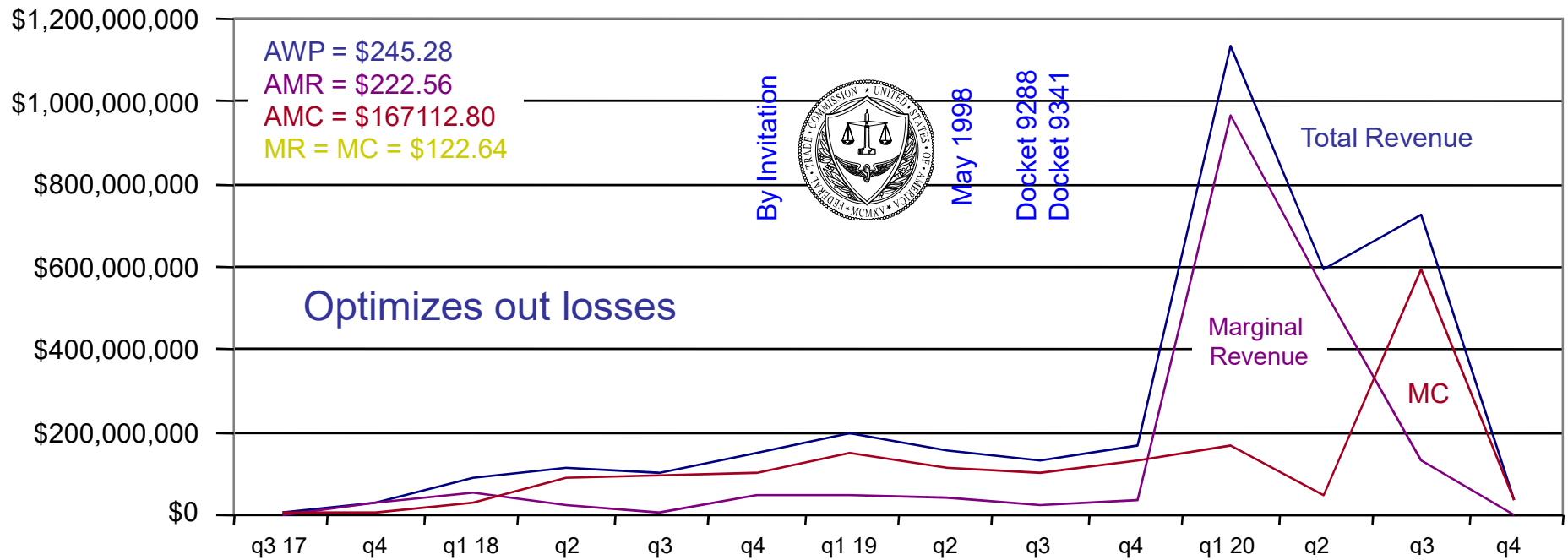
Camp Marketing Consultancy – Xeon Sky lake and Cascade on channel profit maximized 10C



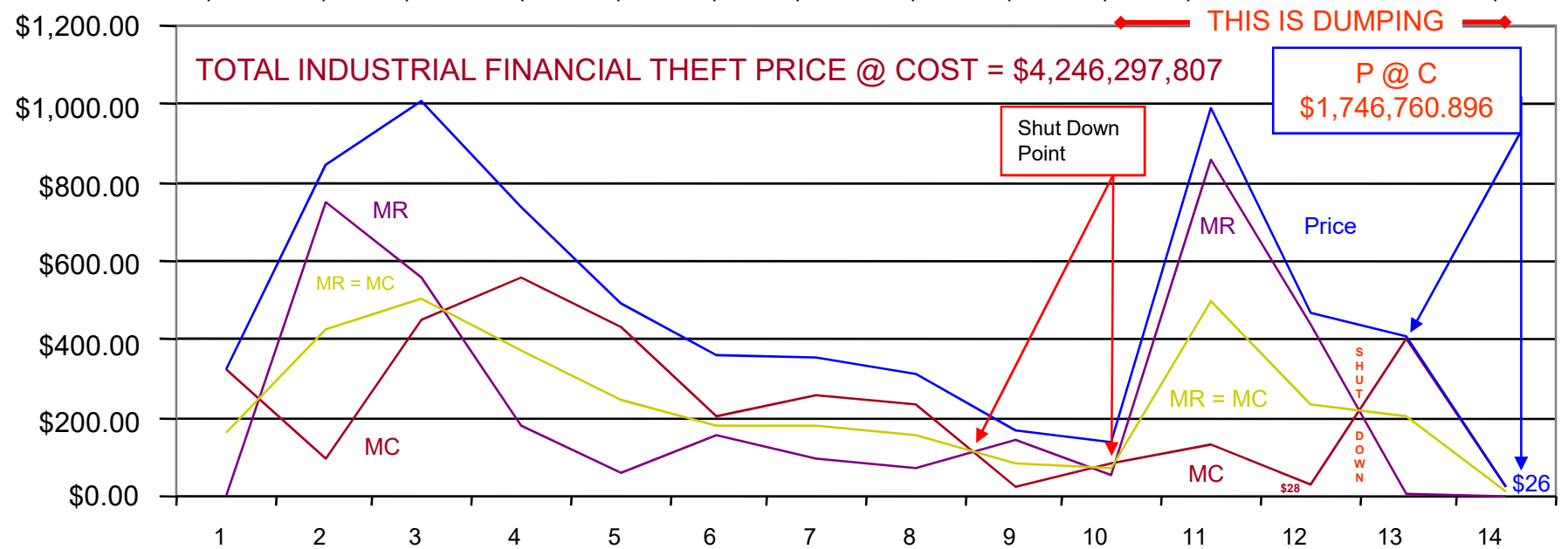
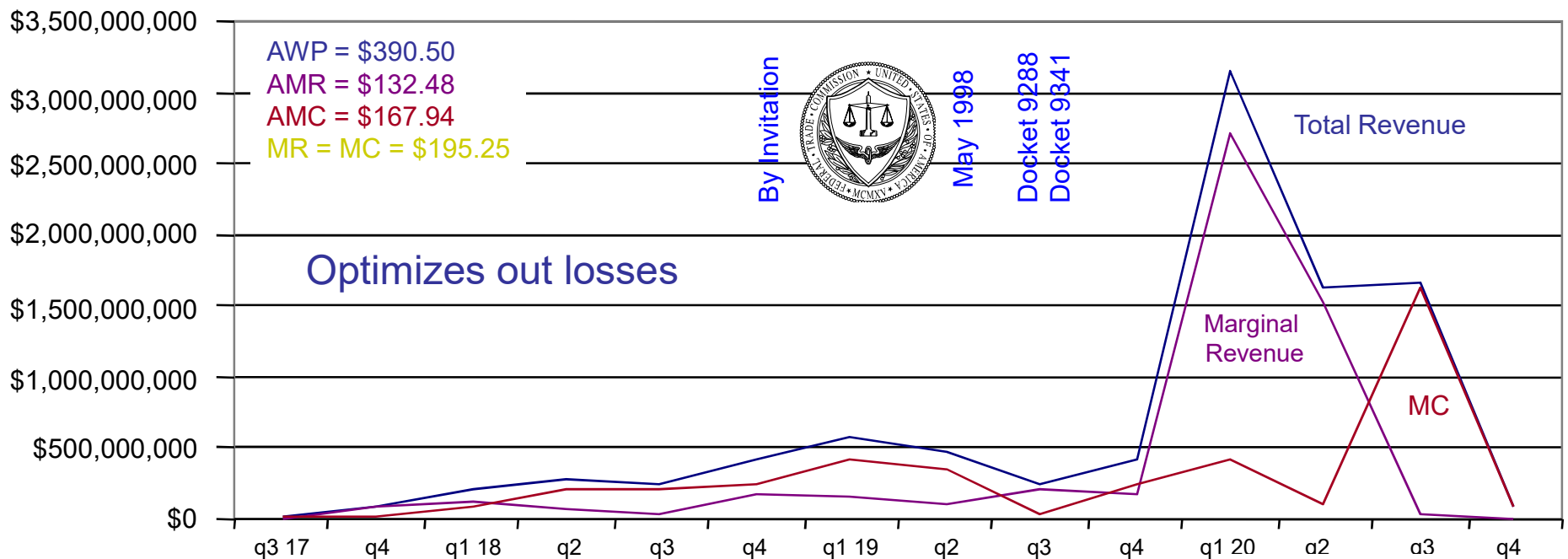
Camp Marketing Consultancy – Xeon Sky lake and Cascade on channel profit maximized 8C



Camp Marketing Consultancy – Xeon Sky lake and Cascade on channel profit maximized 6C



Camp Marketing Consultancy – Xeon Sky lake and Cascade on channel profit maximized 4C



Camp Marketing Consultancy – Xeon Sky lake and Cascade on channel profit maximized gross

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Docket 9288
Docket 9341

Xeon Scalable Lakes only	TOTAL ANNUAL REVENUE	TOTAL LESS COST	INTEL DCG 10K CERT
q3/q4 '17	\$2,281,768,238.35	\$2,135,129,833.88	\$10,500,000,000
2018	\$25,696,602,627.01	\$8,868,763,357.76	\$37,000,000,000
2019	\$40,046,911,256.56	\$13,490,923,431.65	\$37,100,000,000
2020	\$113,560,508,546.96	\$68,364,670,012.72	\$30,445,000,000
Total	\$181,585,790,668.88	\$92,859,486,636.01	\$115,045,000,000.00

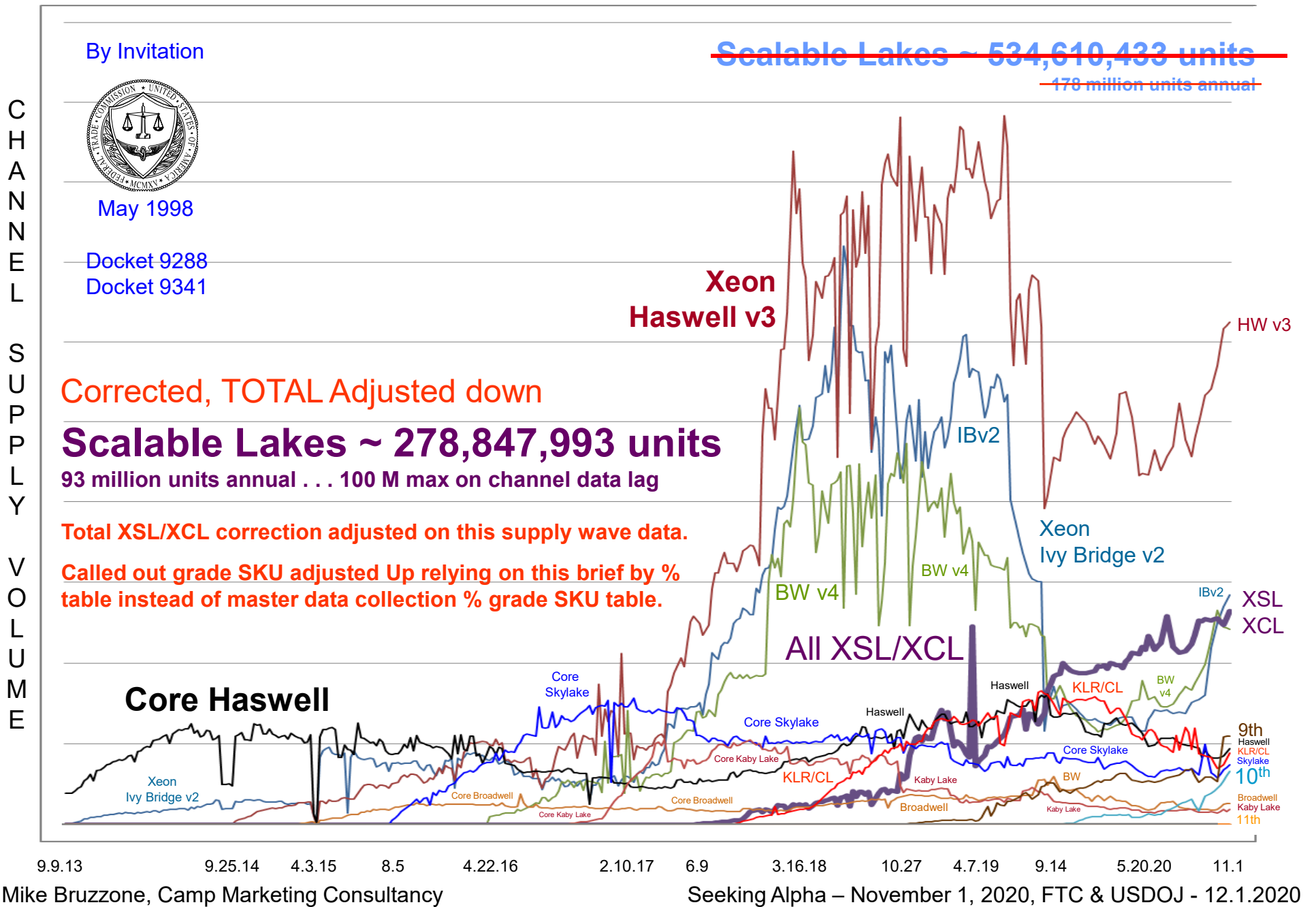
At profit max \$31,264,670,012 in DCG Xeon 2020 revenue is bundle deal sacrifice, laundered and / or stolen. No wonder DCG is reorganizing out of bankruptcy.

Period	Quantity	\$ / ,000 Units < 75% Profit Maximized	Revenue in Quarter	TR per Period or MR	Marginal Cost	MC per Unit
q3 2017	131,351	\$558.19	\$73,319,202.23	\$0.00	\$73,319,202.23	\$558.19
q4 2017	1,360,536	\$1,623.22	\$2,208,449,036.12	\$2,135,129,833.88	\$73,319,202.23	\$53.89
q1 2018	3,523,651	\$1,771.38	\$6,241,740,511.44	\$4,033,291,475.33	\$2,208,449,036.12	\$626.75
q2 2018	4,720,592	\$1,281.65	\$6,050,128,129.13	\$191,612,382.32	\$5,858,515,746.81	\$1,241.06
q3 2018	5,511,465	\$895.77	\$4,937,000,871.82	\$1,113,127,257.31	\$3,823,873,614.51	\$693.80
q4 2018	14,571,645	\$581.11	\$8,467,733,114.62	\$3,530,732,242.80	\$4,937,000,871.82	\$338.81
q1 2019	20,373,795	\$525.97	\$10,715,960,515.07	\$2,248,227,400.45	\$8,467,733,114.62	\$415.62
q2 2019	20,211,505	\$468.90	\$9,477,184,957.44	\$1,238,775,557.63	\$8,238,409,399.82	\$407.61
q3 2019	24,528,293	\$262.65	\$6,442,343,422.64	\$3,034,841,534.81	\$3,407,501,887.83	\$138.92
q4 2019	35,744,565	\$375.20	\$13,411,422,361.41	\$6,969,078,938.77	\$6,442,343,422.64	\$180.23
q1 2020	38,661,780	\$1,344.92	\$51,997,146,526.29	\$38,585,724,164.88	\$13,411,422,361.41	\$346.89
q2 2020	44,487,229	\$615.88	\$27,398,785,693.05	\$24,598,360,833.24	\$2,800,424,859.81	\$62.95
q3 2020	46,170,232	\$705.64	\$32,579,370,707.66	\$5,180,585,014.61	\$27,398,785,693.05	\$593.43
q4 2020	38,328,296	\$41.36	\$1,585,205,619.96	\$0.00	-	\$41.36
	298,324,936		\$181,585,790,668.88	\$92,859,486,636.01	\$88,726,304,032.86	
			\$608.68	\$311.27	\$297.41	

UNREPORTED DEMAND

Averaged Weighed Price = economic Profit Point Average Marginal Revenue Average Marginal Cost

Camp Marketing Consultancy – Server Today, Xeon XCL / XSL in relation v4/v3/v2 & Core



Camp Marketing Consultancy – Server Today, Bonus Slide - All of Intel on All of AMD

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Epyc @ 1.94% of Scalable lower volume also drops from 11 M to 5,344,474 in line with 5,744,750 units on AMD financial reconciliation

On financial Epyc with Thread rippers = 16,210,449

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All of AMD Ryzen era CPU & GPU =
147,562,007 units on Intel supply data
calc and 160,728,573 to 175 M on AMD
financial reconciliation on channel data.

**INTC 10K
Unaccounted
Non-reported**

**Xeon
Haswell v3**



Camp Marketing Consultancy – Intel Core and Xeon at 282 Weeks of Supply

CHANNEL CUMULATING SUPPLY VOLUME

Product Category	% Total
Xeon Ivy Bridge v2	22.62%
Xeon Haswell v3	29.58%
Xeon Broadwell v4	16.80%
Xeon Skylake Scalable	1.55%
Core Haswell	12.02%
Core Broadwell	2.23%
Core Skylake	9.12%
Core Kaby Lake	4.14%
Core KLR & Coffee et.al.	1.94%
	100.00%

70.56% ↑
Updated 2.28
29.4% ↓

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Intel never stopped and simultaneously produced on end customer IT platform standardization all generations v2, v3, v4

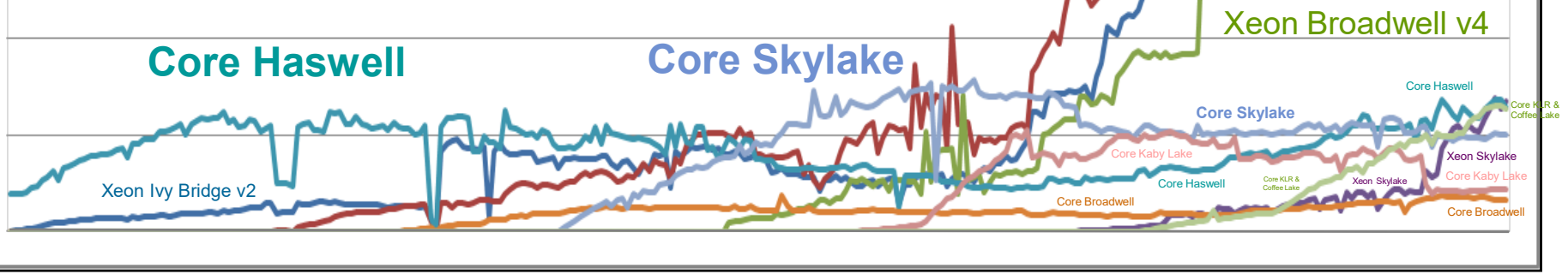
Xeon Haswell v3

Product Category	Total Dice
Xeon Ivy Bridge v2	495,587,100
Xeon Haswell v3	648,148,380
Xeon Broadwell v4	368,138,250
Xeon Skylake Scalable	36,000,000
	278,847,993

H/XCC ONLY	2P DC UPGRADE KEY
56,992,517	v2 = 12C
105,713,001	v3 = 14/16/18C
78,373,233	v4 = 16/18/20/22/24C
8,342,165	XSL = 20/22/24/26/28C

Desktop and Mobile	Total Dice	Architecture
Core Haswell	263,400,000	263,400,000
Core Broadwell	48,860,700	48,860,700
Core Skylake	199,709,880	
Core Kaby Lake	90,609,600	
Core KLR & Coffee et.al.	42,407,400	332,726,880

H/XCC calculated on % channel data
Core Haswell calculated on Broadwell conservative low
Core BW economic estimate 60 to 90 M



9.9.13 9.25.14 4.3.15 8.5 4.22.16 2.10.17 6.9.17 3.16.18 10.27 2.10.19

Camp Marketing Consultancy – Server Today, 170 weeks supply, by SKU Scalable on Epyc

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Product	Unit Volume	Product	Unit Volume
8180 28C	2,556,582	6148 20C	3,475,653
8180M	1,765,545	6133	14,336
8176M	1,946,614	6138	5,716,041
8173M	1,740,610	6148F	416,965
8176F	136,536	6138F	302,010
8280L	54,027	6138T	268,877
8280M	76,637	6248	1,526,789
8280	905,611	6230	1,487,060
8276L	69,736	6230N	2,974
8276M	102,335	6230T	0
8276	194,566	6222V	13,573
6258R	20,360	6209U	3,737
6238R	3,241	6210U	9,837
3175X	29,702	6242R	6,787
3275M	14,145	6222	3,927
3275	35,116	5218R	35,230
8172M 26C	1,373	6154	3,317,842
8170M	1,401,082	6150	4,128,591
8170	2,570,652	6140M	1,836,044
8164	2,011,164	6140	5,328,129
8270	31,227	6240L	4,423
8168 24C	2,000,679	6240M	9,151
8160M	1,785,639	6240	1,023,960
8160	2,910,828	6240C	9,303
8160F	333,122	6240Y	75,417
8160T	389,857	5220S	6,024
8268	815,630	2195	64,055
8260L	59,479	2295	1,906
8260M	82,928	8153	2,322,935
8260C	4,385	8124	38,509
8260Y	51,663	6143	14,336
8260	1,117,564	6142	5,230,255
8256	79,458	6142M	1,891,786
6262V	9,379	6130	11,815,191
6252	1,271,028	6142F	112,935
6252N	4,575	6130F	248,250
6248R	36,183	8253	923,226
6240R	5,033	5218N	2,516
5220R	10,561	5218B	2,898
6112U	10,295	5218	1,294,743
32565M	19,064	5218T	7,626
3255	8,541	6208U	458
6152 22C	3,624,465	6246R	22,648
6238L	4,575	6226R	53,531
6238M	7,168	4216	1,132,319
6238	139,548	3245M	839
6238T	17,768	3245	31,951
			16C
			25,146,953

volume in units

Camp Marketing Consultancy – Server Today, 170 weeks supply, by SKU Scalable on Epyc

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Xeon Skylake & Cascade Lake
and Epyc Naples & Rome

volume in units

XSL \$1K AWP per CPU = \$2361.29

XCL \$1K AWP per CPU = \$2687.61

Naples \$1K AWP per CPU = \$1874.53

Rome \$1K AWP per CPU = \$2364.77

less discount

Product	Unit Volume
6128	5,407,397
3104	6,132,588
3204	1,095,754
2235	33,476
2145	220,074
2140B	34,544
2135	199,332
2133	711,846
5118	14,221,169
2125	321,150
2123	673,527
2104	239,176
2102	196,358
8156	2,295,178
5122	11,056,029
4112	5,790,619
5222	2,151,932
2225	87,541
2223	119,492
Epyc 64C	929,300
Epyc 48C	159,415
Epyc 32C	2,302,209
Epyc 24C	985,633
Epyc 16C	1,434,126
Epyc 12C	198,999
Epyc 8C	1,210,617
14C	9,515,437
12C	40,890,297
10C	25,236,172
8C	63,562,909

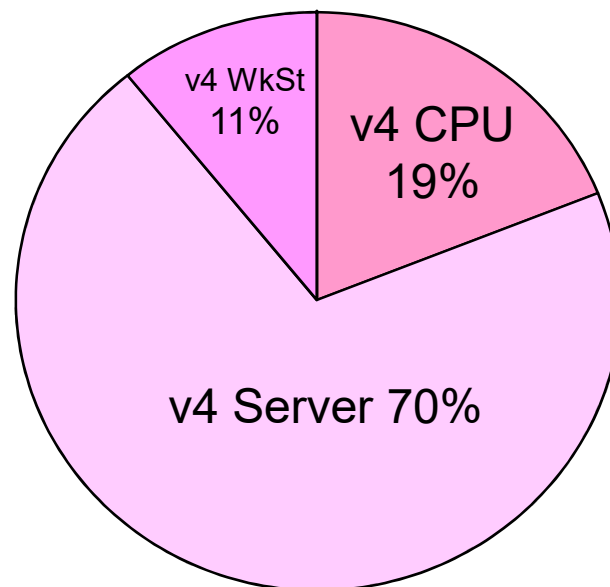
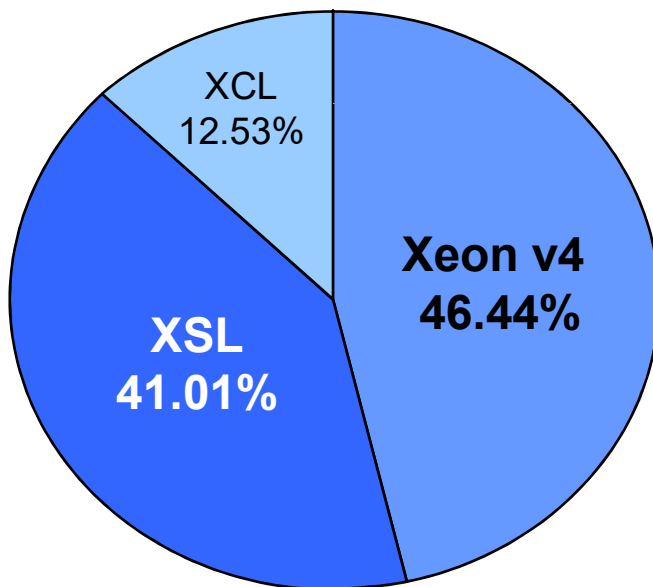
Epyc adjusted on financial reconciliation on channel data

Camp Marketing Consultancy – Server Today, Broadwell Xeon v4 Channel Supplement

Situation; Xeon v4 price slips today and inevitably will let go.

**Scalable Skylake full run inventory volume down 6% in the prior two weeks
8173M < 90%, 8153 < 88%, 8164 < 49%, 6134 < 34%**

Scalable Cascade lake full run inventory up 94% across all component SKUs.



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Broadwell v4 full line \$1K AWP = \$1484.25

Camp Marketing Consultancy – Server Today, Broadwell Xeon v4 Channel Supplement

Rank	Component Grade SKUs Most to Least	% Total 10.29.20	
1	E5 2680 v4 2 way 14C 2.4 35 MB 120w	11.58%	
2	E5 2697A v4 2 way 16C 2.6 40 MB NIC 145w	10.86%	
3	E5 2697 v4 2 way 18C 2.3 45 MB 145w	10.10%	
4	E5 2650I v4 2 way 14C 1.7 35MB 65w	7.91%	
5	E5 2683 v4 2 way 16C 2.1 40 MB 120w	7.18%	47.64%
6	E5 2650 v4 2 way 12C 2.2 30 MB 105w	5.68%	
7	E5 2620 v4 2 way 8C 2.1 20 MB 85w	5.59%	
8	E5 2698 v4 2 way 20C 2.2 50 MB 135w	4.49%	
9	E5 2699 v4 2 way 22C 2.2 55 MB 145w	3.47%	
10	E5 2640 v4 2 way 10C 2.4 25 MB 90w	3.18%	70.05%
11	E5 2630 v4 2 way 10C 2.2 25 MB 85w	3.02%	
12	E5 2603 v4 2 way 6C 1.7 15 MB 85w	2.80%	
13	E5 2630I v4 2 way 10C 1.8 25 MB 55w	2.69%	
14	E5 2660 v4 2 way 14C 2.0 35 MB 105w	2.43%	
15	E5 2690 v4 2 way 14C 2.6 35 MB 135w	2.41%	83.39%
16	E5 2609 v4 2 way 8C 1.7 20 MB 85w	2.10%	
17	E5 2667 v4 2 way 8C 3.2 20 MB 135w	1.97%	
18	E5 2623 v4 2 way 4C 3.0 10 MB 85w	1.61%	
19	E5 2637 v4 2 way 4C 3.5 10 MB 135w	1.21%	
20	E5 2643 v4 2 way 6C 3.4 15 MB 135w	1.00%	91.27%
21	E5 2695 v4 2 way 18C 2.1 45 MB 120w	0.99%	
22	E5 4650 v4 4 way 14C 2.2 30 MB 105w	0.65%	
23	E5 4655 v4 4 way 8C 2.5 30 MB 135w	0.64%	
24	E5 4627 v4 4 way 10C 2.6 25 MB 135w	0.55%	
25	E7 8884 v4 8 way 24C 2.4 60 MB 165w	0.50%	94.59%
26	E7 8891 v4 8 way 10C 2.8 60 MB 165w	0.44%	
27	E7 8893 v4 8 way 4C 3.2 60 MB 140w	0.42%	
28	E5 4660 v4 4 way 16C 2.2 40 MB 120w	0.38%	
29	E7 8890 v4 8 way 24C 2.2 60 MB 165w	0.36%	
30	E5 4667 v4 4 way 18C 2.2 45 MB 135w	0.33%	96.52%

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Camp Marketing Consultancy – Server Today, Broadwell Xeon v4 Channel Supplement

Rank	Component Grade SKUs Most to Least	% Total 10.29.20	
31	E7 4820 v4 4 way 10C 2.0 25 MB 115w	0.33%	
32	E5 1650 v4 uni 6C 3.6 15 MB 140w	0.31%	
33	E5 1630 v4 uni 4C 3.7 10 MB 140w	0.30%	
34	E5 1620 v4 uni 4C 3.5 10 MB 140w	0.28%	
35	E5 4628l v4 4 way 14C 2.6 35 MB 75w	0.26%	97.99%
36	E7 4809 v4 4 way 8C 2.1 20 MB 115w	0.26%	
37	E5 4640 v4 4 way 12C 2.1 30 MB 105w	0.24%	
38	E5 4620 v4 4 way 10C 2.1 25 MB 105w	0.23%	
39	E5 4669 v4 4 way 22C 2.2 55 MB 135w	0.23%	
40	E5 1660 v4 uni 8C 3.2 20 MB 140w	0.21%	99.16%
41	E5 2696 v4 2 way 22C 2.2 55 MB 150w	0.14%	
42	E7 8880 v4 8 way 22C 2.2 55 MB 150w	0.11%	
43	E5 1603 v4 uni 4C 2.8 10 MB 140w	0.10%	
44	E5 268W v4 2 way 12C 3.1 30 MB 160w	0.09%	
45	E5 1607 v4 uni 4C 3.1 10 MB 140w	0.06%	99.66%
46	E7 8867 v4 8 way 18C 2.4 45 MB 165w	0.06%	
47	E5 2658 v4 2 way 14C 2.3 35 MB 105w	0.05%	
48	E5 4610 v4 4 way 10C 1.8 25 MB 105w	0.05%	
49	E5 2699A v4 2 way 22C 2.4 55 MB NIC 145w	0.04%	
50	E7 8870 v4 8 way 20C 2.2 55 MB 140w	0.03%	99.89%
51	E5 1680 v4 uni 8C 3.4 20 MB 140w	0.03%	
52	E5 2689 v4 2 way 10C 3.1 25 MB 165w	0.02%	
53	E7 8855 v4 8 way 14C 2.1 35 MB 140w	0.02%	
54	E7 4850 v4 4 way 16C 2.1 40 MB 115w	0.01%	
55	E7 4830 v4 4 way 14C 2.0 35 MB 115w	0.01%	99.97%
56	E5 2608l v4 2 way 8C 1.6 20 MB 50w	0.01%	
57	E5 2618l v4 2 way 10C 2.2 25 MB 75w	0.01%	
58	E5 2648l v4 2 way 14C 1.8 35 MB 75w	0.01%	
59	E5 2699R v4 2 way 22C 2.2 55 MB 145W	0.01%	
60	E5 2628l v4 2 way 12C 1.9 30 MB 75w	0.00%	
61	E7 8860 v4 8 way 18C 2.2 45 MB 140w	0.00%	100.00%

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Camp Marketing Consultancy – Server Today, Broadwell Xeon v4 Channel Supplement

Broadwell Xeon v4 Grade SKU

Channel % on 10.29.20

E7 8884 v4 8 way 24C 2.4 60 MB 165w	0.50%	
E7 8893 v4 8 way 4C 3.2 60 MB 140w	0.42%	
E7 8891 v4 8 way 10C 2.8 60 MB 165w	0.44%	
E7 8890 v4 8 way 24C 2.2 60 MB 165w	0.36%	
E7 8880 v4 8 way 22C 2.2 55 MB 150w	0.11%	
E7 8870 v4 8 way 20C 2.2 55 MB 140w	0.03%	
E7 8867 v4 8 way 18C 2.4 45 MB 165w	0.06%	
E7 8860 v4 8 way 18C 2.2 45 MB 140w	0.00%	E7 8 way v4
E7 8855 v4 8 way 14C 2.1 35 MB 140w	0.02%	1.94%
E7 4850 v4 4 way 16C 2.1 40 MB 115w	0.01%	
E7 4830 v4 4 way 14C 2.0 35 MB 115w	0.01%	
E7 4820 v4 4 way 10C 2.0 25 MB 115w	0.33%	
E7 4809 v4 4 way 8C 2.1 20 MB 115w	0.26%	E7 4 way v4
E5 4655 v4 4 way 8C 2.5 30 MB 135w	0.64%	1.23%
E5 4610 v4 4 way 10C 1.8 25 MB 105w	0.05%	
E5 4620 v4 4 way 10C 2.1 25 MB 105w	0.23%	
E5 4627 v4 4 way 10C 2.6 25 MB 135w	0.55%	
E5 4640 v4 4 way 12C 2.1 30 MB 105w	0.24%	
E5 4628I v4 4 way 14C 2.6 35 MB 75w	0.26%	
E5 4650 v4 4 way 14C 2.2 30 MB 105w	0.65%	
E5 4660 v4 4 way 16C 2.2 40 MB 120w	0.38%	
E5 4667 v4 4 way 18C 2.2 45 MB 135w	0.33%	E5 4 way v4
E5 4669 v4 4 way 22C 2.2 55 MB 135w	0.23%	4.52%
E5 2623 v4 2 way 4C 3.0 10 MB 85w	1.61%	E5 2 way 4C
E5 2637 v4 2 way 4C 3.5 10 MB 135w	1.21%	2.82%
E5 2603 v4 2 way 6C 1.7 15 MB 85w	2.80%	E5 2 way 6C
E5 2643 v4 2 way 6C 3.4 15 MB 135w	1.00%	3.79%
E5 2608I v4 2 way 8C 1.6 20 MB 50w	0.01%	
E5 2609 v4 2 way 8C 1.7 20 MB 85w	2.10%	
E5 2620 v4 2 way 8C 2.1 20 MB 85w	5.59%	E5 2 way 8C
E5 2667 v4 2 way 8C 3.2 20 MB 135w	1.97%	9.66%
E5 2618I v4 2 way 10C 2.2 25 MB 75w	0.01%	
E5 2630I v4 2 way 10C 1.8 25 MB 55w	2.69%	
E5 2630 v4 2 way 10C 2.2 25 MB 85w	3.02%	
E5 2640 v4 2 way 10C 2.4 25 MB 90w	3.18%	E5 2 way 10C
E5 2689 v4 2 way 10C 3.1 25 MB 165w	0.02%	8.92%

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Camp Marketing Consultancy – Server Today, Broadwell Xeon v4 Channel Supplement

Broadwell Xeon v4 Grade SKU

Channel % on 10.29.20

E5 2628I v4 2 way 12C 1.9 30 MB 75w	0.00%	
E5 2650 v4 2 way 12C 2.2 30 MB 105w	5.68%	E5 2 way 12C
E5 268W v4 2 way 12C 3.1 30 MB 160w	0.09%	5.77%
E5 2648I v4 2 way 14C 1.8 35 MB 75w	0.01%	
E5 2650I v4 2 way 14C 1.7 35MB 65w	7.91%	
E5 2658 v4 2 way 14C 2.3 35 MB 105w	0.05%	
E5 2660 v4 2 way 14C 2.0 35 MB 105w	2.43%	
E5 2680 v4 2 way 14C 2.4 35 MB 120w	11.58%	E5 2 way 14C
E5 2690 v4 2 way 14C 2.6 35 MB 135w	2.41%	24.39%
E5 2683 v4 2 way 16C 2.1 40 MB 120w	7.18%	E5 2 way 16C
E5 2697A v4 2 way 16C 2.6 40 MB NIC 145w	10.86%	18.04%
E5 2695 v4 2 way 18C 2.1 45 MB 120w	0.99%	E5 2 way 18C
E5 2697 v4 2 way 18C 2.3 45 MB 145w	10.10%	11.10%
E5 2698 v4 2 way 20C 2.2 50 MB 135w	4.49%	20C = 4.55%
E5 2696 v4 2 way 22C 2.2 55 MB 150w	0.14%	
E5 2699 v4 2 way 22C 2.2 55 MB 145w	3.47%	
E5 2699A v4 2 way 22C 2.4 55 MB NIC 145w	0.04%	E5 2 way 22C
E5 2699R v4 2 way 22C 2.2 55 MB 145W	0.01%	3.65%
E5 1603 v4 uni 4C 2.8 10 MB 140w	0.10%	
E5 1607 v4 uni 4C 3.1 10 MB 140w	0.06%	
E5 1620 v4 uni 4C 3.5 10 MB 140w	0.28%	
E5 1630 v4 uni 4C 3.7 10 MB 140w	0.30%	
E5 1650 v4 uni 6C 3.6 15 MB 140w	0.31%	
E5 1660 v4 uni 8C 3.2 20 MB 140w	0.21%	E5 16xx v4 uni
E5 1680 v4 uni 8C 3.4 20 MB 140w	0.03%	1.29%
	100.00%	

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Camp Marketing Consultancy – Server Today, Haswell Xeon v3 Channel Supplement

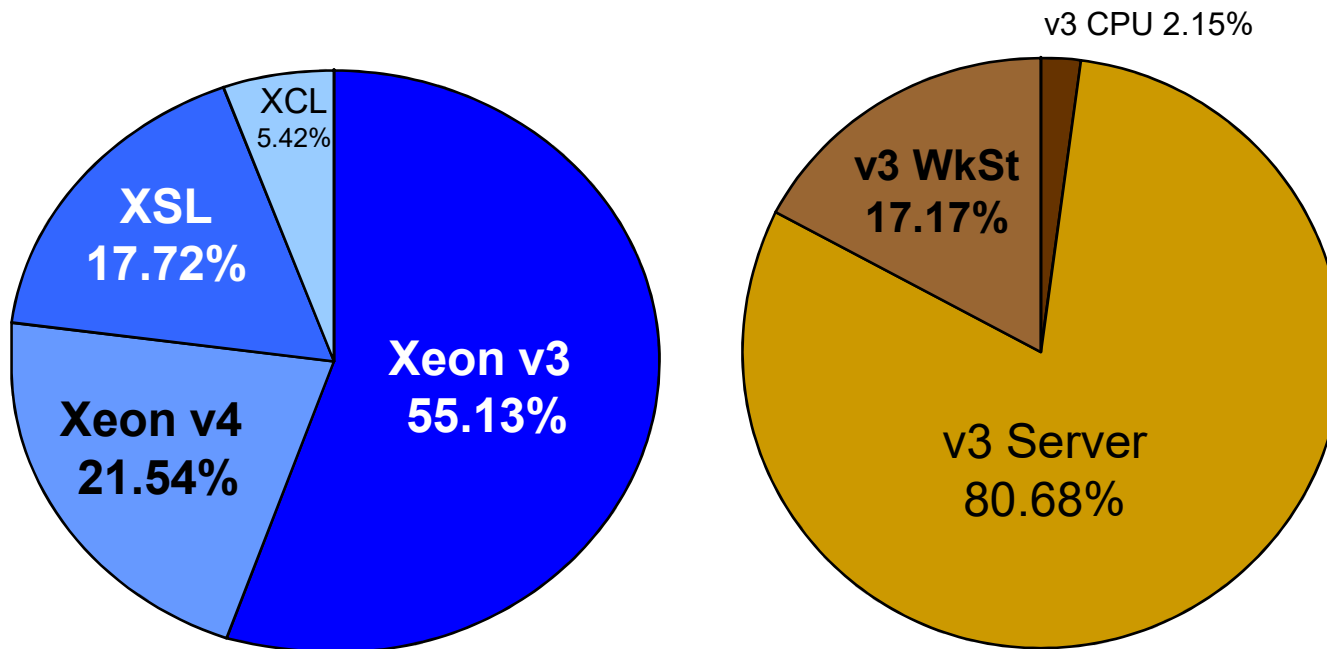
Situation; Xeon v3; just above and fallen into world market price; continued decline.

Haswell v3 represents 55.31% in terms of commercial category at risk values.

v3 inventory is down from peak holding 9.28.18 through 10.27.18, by 31%, hit bottom 9.14.19 at 57% off peak and has since gained 61% through the summer.

Always most “at risk category” on total production, limited ability to over clock.
A great lay up made not to be salvageable shows; Ivy Bridge had more stretch.

Might find life as a control plane processor?



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Camp Marketing Consultancy – Server Today, Haswell Xeon v3 Channel Supplement

Rank	Component Grade SKUs Most to Least	% Total 10.29.20
1	E5 2620 v3 2 way 6C 2.4 15 MB 85w	12.55%
2	E5 2630 v3 2 way 8C 2.4 20 MB 85w	9.34%
3	E5 2643 v3 2 way 6C 3.4 20 MB 135w	6.85%
4	E5 2623 v3 2 way 4C 3.0 10 MB 105w	6.58%
5	E5 2680 v3 2 way 12C 2.5 30 MB 120w	6.35%
6	E5 2650 v3 2 way 10C 2.3 25 MB 105w	5.57%
7	E5 2699 v3 2 way 18C 2.3 45 MB 145w	5.20%
8	E5 2690 v3 2 way 12C 2.6 30 MB 135w	4.44%
9	E5 2697 v3 2 way 14C 2.6 35 MB 145w	3.96%
10	E5 2687W v3 2 way 10C 3.1 25 MB 160w	3.70%
11	E5 2660 v3 2 way 10C 2.6 25 MB 105w	3.63%
12	E5 2670 v3 2 way 12C 2.4 30 MB 120w	3.47%
13	E5 2683 v3 2 way 14C 2.0 35 MB 120w	3.37%
14	E5 2640 v3 2 way 8C 2.6 20 MB 90w	3.18%
15	E5 2678 v3 2 way 12C 2.5 30 MB 120w	3.01%
16	E5 2667 v3 2 way 8C 3.2 20 MB 135w	2.56%
17	E5 2637 v3 2 way 4C 3.5 15 MB 135w	2.53%
18	E5 2603 v3 2 way 6C 1.6 15 MB 85w	2.42%
19	E5 2698 v3 2 way 16C 2.3 40 MB 135w	1.87%
20	E5 2609 v3 2 way 6C 1.9 15 MB 85w	1.77%
21	E5 2630I v3 2 way 8C 1.8 20 MB 55w	1.20%
22	E5 2695 v3 2 way 14C 2.3 35 MB 120w	0.95%
23	E5 1650 v3 uni 6C 3.5 15 MB 140w	0.65%
24	E5 1620 v3 uni 4C 3.5 10 MB 140w	0.62%
25	E7 8890 v3 8 way 18C 2.5 45 MB 165w	0.56%
26	E5 1660 v3 uni 8C 3.0 20 MB 140w	0.52%
27	E5 2650 lv3 2 way 12C 1.8 30 MB 65w	0.48%
28	E7 8893 v3 8 way 4C 3.2 45 MB 140w	0.33%
29	E7 8860 v3 8 way 16C 2.2 40 MB 140w	0.28%
30	E7 8891 v3 8 way 10C 2.8 45 MB 165w	0.27%

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Camp Marketing Consultancy – Server Today, Haswell Xeon v3 Channel Supplement

Rank	Component Grade SKUs Most to Least	% Total 10.29.20
31	E5 1603 v3 uni 4C 2.8 10 MB 140w	0.19%
32	E5 1607 v3 uni 4C 3.1 10 MB 140w	0.17%
33	E7 8880l v3 8 way 18C 2.0 45 MB 115w	0.16%
34	E7 8880 v3 8 way 18C 2.3 45 MB 140w	0.14%
35	E7 8867 v3 8 way 16C 2.5 45 MB 165w	0.12%
36	E5 4650 v3 4 way 12C 2.1 30 MB 105w	0.10%
37	E7 8870 v3 8 way 18C 2.1 45 MB 150w	0.10%
38	E5 4627 v3 4 way 10C 2.6 25 MB 135w	0.10%
39	E5 4620 v3 4 way 10C 2.0 25 MB 105w	0.09%
40	E5 4660 v3 4 way 14C 2.1 35 MB 120w	0.08%
41	E5 2673 v3 2 way 12C 2.4 30 MB 105w	0.07%
42	E5 4640 v3 4 way 12C 1.9 30 MB 105w	0.06%
43	E5 1630 v3 uni 4C 3.7 10 MB 140w	0.06%
44	E7 4809 v3 4 way 8C 2.0 20 MB 115w	0.05%
45	E5 4610 v3 4 way 10C 1.7 25 MB 105w	0.04%
46	E5 4669 v3 4 way 18C 2.1 45 MB 135w	0.04%
47	E5 4667 v3 4 way 16C 2.0 40 MB 135w	0.04%
48	E7 4830 v3 4 way 12C 2.1 30 MB 115w	0.04%
49	E5 2658 v3 2 way 12C 2.2 30 MB 105w	0.02%
50	E5 2628 v3 2 way 8C 2.5 20 MB 85w	0.02%
51	E7 4850 v3 4 way 14C 2.2 35 MB 115w	0.02%
52	E5 1680 v3 uni 8C 3.2 20 MB 140w	0.02%
53	E5 2608l v3 2 way 6C 2.0 15 MB 50w	0.01%
54	E5 4655 v3 4 way 6C 2.9 30 MB 135w	0.01%
55	E7 4820 v3 4 way 10C 1.9 25 MB 115w	0.01%
56	E5 4648 v3 4 way 12C 1.7 30 MB 105w	0.01%
57	E5 2685 v3 2 way 12C 2.6 30 MB 120w	0.01%
58	E5 2618l v3 2 way 8C 2.3 20 MB 75w	0.01%
59	E5 2628l v3 2 way 10C 2.0 25 MB 75w	0.0032%
60	E5 2648l v3 2 way 12C 1.8 30 MB 75w	0.0024%
61	E5 2686 v3 2 way 18C 2.0 45 MB 120w	0.0024%
62	E5 2652 v3 2 way 10C 2.3 25 MB 105w	0.0016%
63	E5 2666 v3 2 way 10C 2.9 25 MB 120w	0.0016%
64	E5 2663 v3 2 way 10C 2.8 25 MB 120w	0.0008%

99.00%

99.46%

99.74%

99.90%

99.97%

99.99%

100.00%

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Camp Marketing Consultancy – Server Today, Haswell Xeon v3 Channel Supplement

Haswell Xeon v3 Grade SKU

Channel % on 10.30.20

E7 8893 v3 8 way 4C 3.2 45 MB 140w	0.33%	
E7 8891 v3 8 way 10C 2.8 45 MB 165w	0.27%	
E7 8890 v3 8 way 18C 2.5 45 MB 165w	0.56%	
E7 8880l v3 8 way 18C 2.0 45 MB 115w	0.16%	
E7 8880 v3 8 way 18C 2.3 45 MB 140w	0.14%	
E7 8870 v3 8 way 18C 2.1 45 MB 150w	0.10%	
E7 8867 v3 8 way 16C 2.5 45 MB 165w	0.12%	E7 8 way v3
E7 8860 v3 8 way 16C 2.2 40 MB 140w	0.28%	1.96%
E7 4850 v3 4 way 14C 2.2 35 MB 115w	0.02%	
E7 4830 v3 4 way 12C 2.1 30 MB 115w	0.04%	
E7 4820 v3 4 way 10C 1.9 25 MB 115w	0.01%	E7 4 way v3
E7 4809 v3 4 way 8C 2.0 20 MB 115w	0.05%	0.12%
E5 4655 v3 4 way 6C 2.9 30 MB 135w	0.01%	
E5 4610 v3 4 way 10C 1.7 25 MB 105w	0.04%	
E5 4620 v3 4 way 10C 2.0 25 MB 105w	0.09%	
E5 4627 v3 4 way 10C 2.6 25 MB 135w	0.10%	
E5 4640 v3 4 way 12C 1.9 30 MB 105w	0.06%	
E5 4648 v3 4 way 12C 1.7 30 MB 105w	0.01%	
E5 4650 v3 4 way 12C 2.1 30 MB 105w	0.10%	
E5 4660 v3 4 way 14C 2.1 35 MB 120w	0.08%	
E5 4667 v3 4 way 16C 2.0 40 MB 135w	0.04%	E5 4 way v3
E5 4669 v3 4 way 18C 2.1 45 MB 135w	0.04%	0.61%
E5 2623 v3 2 way 4C 3.0 10 MB 105w	6.58%	E5 2 way 4C
E5 2637 v3 2 way 4C 3.5 15 MB 135w	2.53%	9.11%
E5 2603 v3 2 way 6C 1.6 15 MB 85w	2.42%	
E5 2608l v3 2 way 6C 2.0 15 MB 50w	0.01%	
E5 2609 v3 2 way 6C 1.9 15 MB 85w	1.77%	
E5 2620 v3 2 way 6C 2.4 15 MB 85w	12.55%	E5 2 way 6C
E5 2643 v3 2 way 6C 3.4 20 MB 135w	6.85%	23.60%
E5 2618l v3 2 way 8C 2.3 20 MB 75w	0.01%	
E5 2628 v3 2 way 8C 2.5 20 MB 85w	0.02%	
E5 2630 v3 2 way 8C 2.4 20 MB 85w	9.34%	
E5 2630l v3 2 way 8C 1.8 20 MB 55w	1.20%	
E5 2640 v3 2 way 8C 2.6 20 MB 90w	3.18%	E5 2 way 8C
E5 2667 v3 2 way 8C 3.2 20 MB 135w	2.56%	16.30%

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Considering estimated loss;

Analyst estimates 648,148,380
Haswell Xeon v3 produced

This weeks sample = 0.004%
of the total data base of v3
recorded available for sale
begins September 2014

Camp Marketing Consultancy – Server Today, Haswell Xeon v3 Channel Supplement

Haswell Xeon v3 Grade SKU

Channel % on 10.30.20

E5 2628I v3 2 way 10C 2.0 25 MB 75w	0.00%	
E5 2650 v3 2 way 10C 2.3 25 MB 105w	5.57%	
E5 2652 v3 2 way 10C 2.3 25 MB 105w	0.00%	
E5 2660 v3 2 way 10C 2.6 25 MB 105w	3.63%	
E5 2663 v3 2 way 10C 2.8 25 MB 120w	0.00%	
E5 2666 v3 2 way 10C 2.9 25 MB 120w	0.00%	E5 2 way 10C
E5 2687W v3 2 way 10C 3.1 25 MB 160w	3.70%	12.91%
E5 2648I v3 2 way 12C 1.8 30 MB 75w	0.00%	
E5 2650 lv3 2 way 12C 1.8 30 MB 65w	0.48%	
E5 2658 v3 2 way 12C 2.2 30 MB 105w	0.02%	
E5 2670 v3 2 way 12C 2.4 30 MB 120w	3.47%	
E5 2673 v3 2 way 12C 2.4 30 MB 105w	0.07%	
E5 2678 v3 2 way 12C 2.5 30 MB 120w	3.01%	
E5 2680 v3 2 way 12C 2.5 30 MB 120w	6.35%	
E5 2685 v3 2 way 12C 2.6 30 MB 120w	0.01%	E5 2 way 12C
E5 2690 v3 2 way 12C 2.6 30 MB 135w	4.44%	17.85%
E5 2683 v3 2 way 14C 2.0 35 MB 120w	3.37%	
E5 2695 v3 2 way 14C 2.3 35 MB 120w	0.95%	E5 2 way 14C
E5 2697 v3 2 way 14C 2.6 35 MB 145w	3.96%	8.28%
E5 2698 v3 2 way 16C 2.3 40 MB 135w	1.87%	1.87%
E5 2686 v3 2 way 18C 2.0 45 MB 120w	0.00%	E5 2 way 18C
E5 2699 v3 2 way 18C 2.3 45 MB 145w	5.20%	5.20%
E5 1603 v3 uni 4C 2.8 10 MB 140w	0.19%	
E5 1607 v3 uni 4C 3.1 10 MB 140w	0.17%	
E5 1620 v3 uni 4C 3.5 10 MB 140w	0.62%	
E5 1630 v3 uni 4C 3.7 10 MB 140w	0.06%	
E5 1650 v3 uni 6C 3.5 15 MB 140w	0.65%	
E5 1660 v3 uni 8C 3.0 20 MB 140w	0.52%	E5 1600 v3 uni
E5 1680 v3 uni 8C 3.2 20 MB 140w	0.02%	2.23%
	100.00%	

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Estimated channel loss on
v3 inventory on 10.30.20

Haswell v3 full line \$1K AWP
= \$1408.65 per CPU

CPU @ 1K < 80% = \$680,659

Server @ 1K x 3 = \$383,095,045

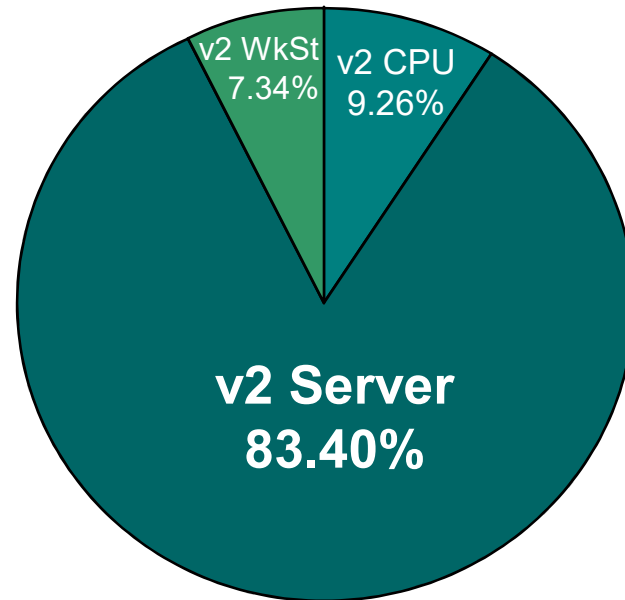
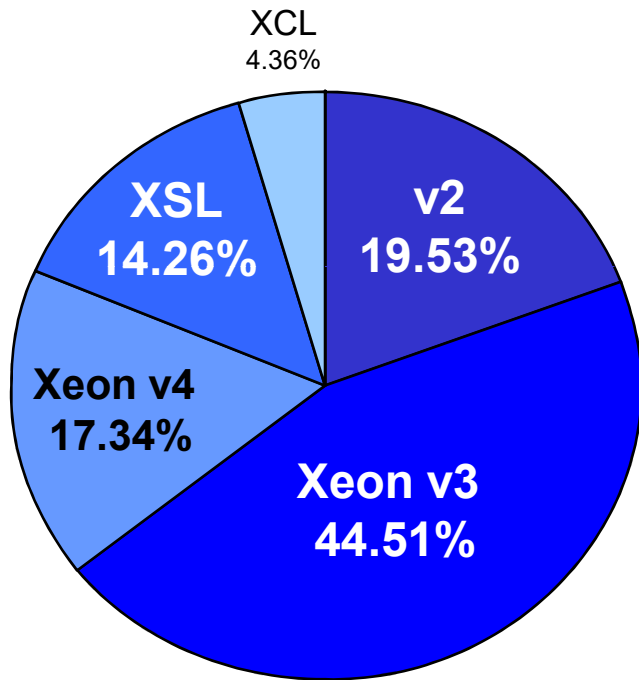
Workstation @ 1K x 2 = \$55,337,970

At risk loss = \$438 million
solely limited to ebay market place listings

Camp Marketing Consultancy – Server Today, Ivy Bridge Xeon v2 Channel Supplement

Situation; Xeon v2; 4-way sells, clears, E7 48xx and E5 46xx

Over-clock-able grade SKUs remain competitive v v3 for home office.



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Camp Marketing Consultancy – Server Today, Ivy Bridge Xeon v2 Channel Supplement

Rank	Component Grade SKUs Most to Least	% Total 10.29.20	
1	E5 2630 v2 2-way 6C 2.6 15 MB 80w	11.17%	
2	E5 2680 v2 2-way 10C 2.8 25 MB 115w	10.57%	
3	E5 2620 v2 2-way 6C 2.1 15 MB 80w	9.17%	
4	E5 2637 v2 2-way 4C 3.5 15 MB 130w	7.99%	
5	E5 2640 v2 2-way 8C 2.0 20 MB 95w	6.77%	45.67%
6	E5 2660 v2 2-way 10C 2.2 25 MB 95w	6.62%	
7	E5 2667 v2 2-way 8C 3.3 25 MB 130w	6.45%	
8	E5 2670 v2 2-way 10C 2.5 25 MB 115w	5.50%	
9	E5 2690 v2 2-way 10C 3.0 25 MB 130w	4.45%	
10	E5 2650 v2 2-way 8C 2.6 20 MB 95w	4.27%	76.72%
11	E5 2695 v2 2-way 12C 2.4 30 MB 115w	3.77%	
12	E5 2697 v2 2-way 12C 2.7 30 MB 130w	3.58%	
13	E5 2403 v2 2-way 4C 1.8 10 MB 80w	2.29%	
14	E5 2603 v2 2-way 4C 1.8 10 MB 80w	2.29%	
15	E5 4620 v2 2-way 8C 2.6 20 MB 95w	1.33%	86.21%
16	E5 2609 v2 2-way 4C 2.5 10 MB 80w	1.22%	
17	E7 4820 v2 4-way 8C 2.0 16 MB 105w	1.14%	
18	E5 2650l v2 2-way 10C 1.7 25 MB 70w	0.98%	
19	E5 2643 v2 2-way 6C 3.5 25 MB 130w	0.90%	
20	E5 1650 v2 uni 6C 3.5 12 MB 130w	0.89%	91.35%
21	E5 1620 v2 uni 4C 3.7 10 MB 130w	0.83%	
22	E5 2430 v2 2-way 6C 2.5 15 MB 80w	0.82%	
23	E7 4860 v2 4-way 12C 2.6 24 MB 130w	0.76%	
24	E5 2420 v2 2-way 6C 2.2 15 MB 80w	0.70%	
25	E7 4890 v2 4-way 15C 2.8 37.5 MB 155w	0.66%	95.12%
26	E5 2407 v2 2-way 4C 2.4 10 MB 80w	0.42%	
27	E5 1607 v2 uni 4C 3.0 10 130w	0.36%	
28	E7 8857 v2 8-way 12C 3.0 30 MB 130w	0.29%	
29	E5 4650l v2 4-way 10C 2.4 30 MB 95w	0.29%	
30	E5 2470 v2 2-way 10C 2.4 20 MB 95w	0.24%	96.71%
31	E5 2430l v2 2-way 6C 2.4 15 MB 60w	0.23%	
32	E5 2687W v2 2-way 8C 3.4 25 MB 150w	0.23%	
33	E5 4603 v2 4-way 4C 2.2 15 MB 95w	0.22%	
34	E7 4850 v2 4-way 12C 2.3 24 MB 105w	0.21%	
35	E5 1660 v2 uni 6C 3.7 15 MB 130w	0.21%	97.82%

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Camp Marketing Consultancy – Server Today, Ivy Bridge Xeon v2 Channel Supplement

Rank	Component Grade SKUs Most to Least	% Total 10.29.20
36	E5 4657I v2 4-way 12C 2.4 30 MB 115w	0.20%
37	E5 2696 v2 2-way 12C 2.5 30 MB 120w	0.19%
38	E7 4880 v2 4-way 15C 2.5 37.5 MB 130w	0.18%
39	E5 4640 v2 4-way 10C 2.2 30 MB 95w	0.17%
40	E5 2450 v2 2-way 8C 2.5 20 MB 95w	0.17%
41	E5 2440 v2 2-way 8C 1.9 20 MB 95w	0.14%
42	E5 4627 v2 2-way 8C 3.3 20 MB 130w	0.13%
43	E7 4830 v2 4-way 10C 2.2 20 MB 105w	0.10%
44	E5 4607 v2 4-way 6C 2.6 15 MB 95w	0.09%
45	E5 4610 v2 2-way 8C 2.3 20 MB 95w	0.08%
46	E5 1680 v2 uni 8C 3.0 25 MB 130w	0.08%
47	E7 8891 v2 8-way 10C 3.2 37.5 MB 155w	0.07%
48	E7 8880 v2 8-way 15C 2.5 37.5 MB 130w	0.06%
49	E7 4870 v2 4-way 15C 2.3 30 MB 130w	0.05%
50	E5 2450I v2 2-way 10C 1.8 20 MB 60w	0.05%
51	E7 8893 v2 8-way 6C 3.4 37.5 MB 155w	0.05%
52	E5 1428I; v2 uni 6C 2.2 15 MB 60w	0.04%
53	E7 4809 v2 4-way 6C 1.9 12 MB 105w	0.04%
54	E5 2648L v2 2-way 10C 1.9 25 MB 70w	0.04%
55	E5 2418L v2 2-way 6C 2.0 15 MB 50w	0.04%
56	E7 2880 v2 2-way 15C 2.5 37.5 MB 130w	0.03%
57	E7 8895 v2 8-way 15C 3.4 37.5 MB 155w 128 bit data	0.02%
58	E7 2890 v2 2-way 15C 2.8 37.5 MB 155w	0.02%
59	E5 2448I v2 2-way 10C 1.8 20 MB 70w	0.02%
60	E7 8890 v2 8-way 15C 2.8 37.5 MB 155w	0.02%
61	E7 2870 v2 2-way 15C 2.3 30 MB 130w	0.02%
62	E5 2628I v2 2-way 8C 1.9 20 MB 70w	0.02%
63	E5 2428I v2 2-way 8C 1.8 20 MB 60w	0.01%
64	E7 8850 v2 8-way 12C 2.3 24 MB 105w	0.01%
65	E7 2850 v2 2-way 12C 2.3 24 MB 105w	0.01%
66	E7 8880I v2 8-way 15C 2.2 37.5 MB 105w	0.01%
67	E5 2618L v2 2-way 6C 2.0 15 MB 50w	0.01%
68	E5 4624L v2 4-way 10C 1.9 25 MB 70w	0.00%
69	E7 8870 v2 8-way 15C 2.3 30 MB 130w	0.00%
70	E5 2692 v2 2-way 12C 2.2 30 MB 115w	0.00%

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Ivy Bridge Xeon v2 Grade SKU

Channel % on 10.29.20

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E7 8895 v2 8-way 15C 3.4 37.5 MB 155w 128 bit data	0.02%	
E7 8890 v2 8-way 15C 2.8 37.5 MB 155w	0.02%	
E7 8880 v2 8-way 15C 2.5 37.5 MB 130w	0.06%	
E7 8870 v2 8-way 15C 2.3 30 MB 130w	0.00%	
E7 8880I v2 8-way 15C 2.2 37.5 MB 105w	0.01%	
E7 8850 v2 8-way 12C 2.3 24 MB 105w	0.01%	
E7 8857 v2 8-way 12C 3.0 30 MB 130w	0.29%	
E7 8891 v2 8-way 10C 3.2 37.5 MB 155w	0.07%	E7 v2 8-way
E7 8893 v2 8-way 6C 3.4 37.5 MB 155w	0.05%	0.53%
E7 4890 v2 4-way 15C 2.8 37.5 MB 155w	0.66%	
E7 4880 v2 4-way 15C 2.5 37.5 MB 130w	0.18%	
E7 4870 v2 4-way 15C 2.3 30 MB 130w	0.05%	
E7 4860 v2 4-way 12C 2.6 24 MB 130w	0.76%	
E7 4850 v2 4-way 12C 2.3 24 MB 105w	0.21%	
E7 4830 v2 4-way 10C 2.2 20 MB 105w	0.10%	
E7 4820 v2 4-way 8C 2.0 16 MB 105w	1.14%	E7 v2 4-way
E7 4809 v2 4-way 6C 1.9 12 MB 105w	0.04%	3.15%
E7 2890 v2 2-way 15C 2.8 37.5 MB 155w	0.02%	
E7 2880 v2 2-way 15C 2.5 37.5 MB 130w	0.03%	
E7 2870 v2 2-way 15C 2.3 30 MB 130w	0.02%	E7 v2 2-way
E7 2850 v2 2-way 12C 2.3 24 MB 105w	0.01%	0.08%
E5 4603 v2 4-way 4C 2.2 15 MB 95w	0.22%	
E5 4607 v2 4-way 6C 2.6 15 MB 95w	0.09%	
E5 4610 v2 2-way 8C 2.3 20 MB 95w	0.08%	
E5 4620 v2 2-way 8C 2.6 20 MB 95w	1.33%	
E5 4627 v2 2-way 8C 3.3 20 MB 130w	0.13%	
E5 4624L v2 4-way 10C 1.9 25 MB 70w	0.00%	26xx 4 channel
E5 4640 v2 4-way 10C 2.2 30 MB 95w	0.17%	E5 v2 4-way
E5 4650I v2 4-way 10C 2.4 30 MB 95w	0.29%	2.32%
E5 4657I v2 4-way 12C 2.4 30 MB 115w	0.20%	0.20%
E5 2603 v2 2-way 4C 1.8 10 MB 80w	2.29%	26xx 4 channel
E5 2609 v2 2-way 4C 2.5 10 MB 80w	1.22%	E5 2-way 4C
E5 2637 v2 2-way 4C 3.5 15 MB 130w	7.99%	11.50%

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Ivy Bridge Xeon v2 Grade SKU

E5 2620 v2 2-way 6C 2.1 15 MB 80w
 E5 2630 v2 2-way 6C 2.6 15 MB 80w
 E5 2643 v2 2-way 6C 3.5 25 MB 130w
 E5 2618L v2 2-way 6C 2.0 15 MB 50w
 E5 2640 v2 2-way 8C 2.0 20 MB 95w
 E5 2650 v2 2-way 8C 2.6 20 MB 95w
 E5 2667 v2 2-way 8C 3.3 25 MB 130w
 E5 2687W v2 2-way 8C 3.4 25 MB 150w
 E5 2628I v2 2-way 8C 1.9 20 MB 70w
 E5 2660 v2 2-way 10C 2.2 25 MB 95w
 E5 2670 v2 2-way 10C 2.5 25 MB 115w
 E5 2680 v2 2-way 10C 2.8 25 MB 115w
 E5 2690 v2 2-way 10C 3.0 25 MB 130w
 E5 2648L v2 2-way 10C 1.9 25 MB 70w
 E5 2650I v2 2-way 10C 1.7 25 MB 70w
 E5 2692 v2 2-way 12C 2.2 30 MB 115w
 E5 2695 v2 2-way 12C 2.4 30 MB 115w
 E5 2696 v2 2-way 12C 2.5 30 MB 120w
 E5 2697 v2 2-way 12C 2.7 30 MB 130w
 E5 2403 v2 2-way 4C 1.8 10 MB 80w
 E5 2407 v2 2-way 4C 2.4 10 MB 80w
 E5 1428I; v2 uni 6C 2.2 15 MB 60w
 E5 2420 v2 2-way 6C 2.2 15 MB 80w
 E5 2430 v2 2-way 6C 2.5 15 MB 80w
 E5 2418L v2 2-way 6C 2.0 15 MB 50w
 E5 2430I v2 2-way 6C 2.4 15 MB 60w
 E5 2440 v2 2-way 8C 1.9 20 MB 95w
 E5 2450 v2 2-way 8C 2.5 20 MB 95w
 E5 2428I v2 2-way 8C 1.8 20 MB 60w
 E5 2470 v2 2-way 10C 2.4 20 MB 95w
 E5 2448I v2 2-way 10C 1.8 20 MB 70w
 E5 2450I v2 2-way 10C 1.8 20 MB 60w
 E5 1607 v2 uni 4C 3.0 10 130w
 E5 1620 v2 uni 4C 3.7 10 MB 130w
 E5 1650 v2 uni 6C 3.5 12 MB 130w
 E5 1660 v2 uni 6C 3.7 15 MB 130w
 E5 1680 v2 uni 8C 3.0 25 MB 130w

Channel % on 10.29.20

9.17%
 11.17%
 0.90%
 0.01%
 6.77%
 4.27%
 6.45%
 0.23%
 0.02%
 6.62%
 5.50%
 10.57%
 4.45%
 0.04%
 0.98%
 0.00%
 3.77%
 0.19%
 3.58%
 2.29%
 0.42%
 0.04%
 0.70%
 0.82%
 0.04%
 0.23%
 0.14%
 0.17%
 0.01%
 0.24%
 0.02%
 0.05%
 0.36%
 0.83%
 0.89%
 0.21%
 0.08%
 100.00%

26xx 4 channel
 E5 2-way 6C
 21.25%

 26xx 4 channel
 E5 2-way 8C
 17.73%

 26xx 4 channel
 E5 2-way 10C
 28.16%

 26xx 4 channel
 E5 2-way 12C
 7.54%
 24xx 3 channel
 2.71%

 24xx 3 channel
 E5 2-way 6C
 1.83%
 24xx 3 channel
 E5 2-way 8C
 0.32%
 24xx 3 channel
 E5 2-way 10C
 0.31%

 E5 16xx v2 uni
 2.37%

By Invitation



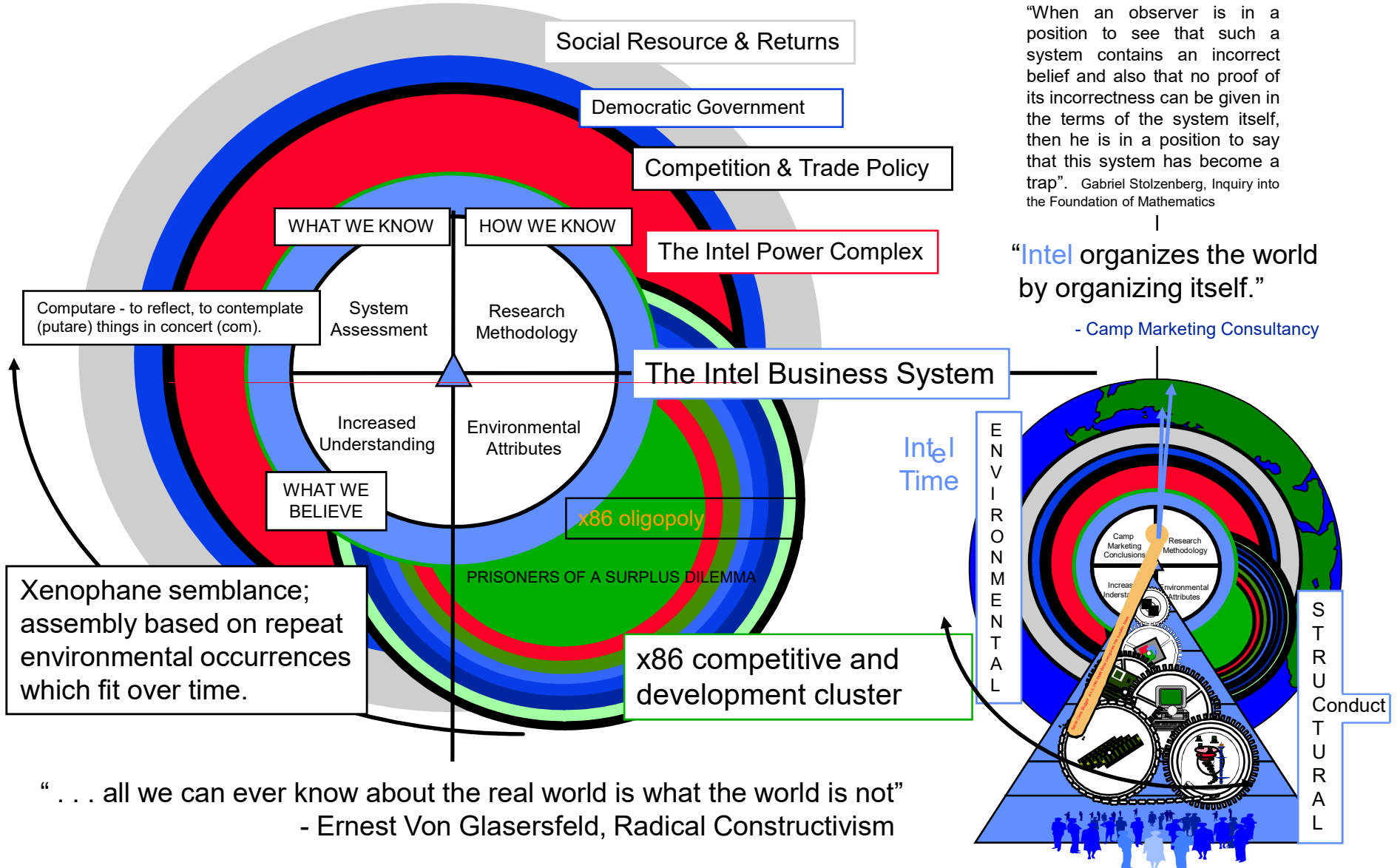
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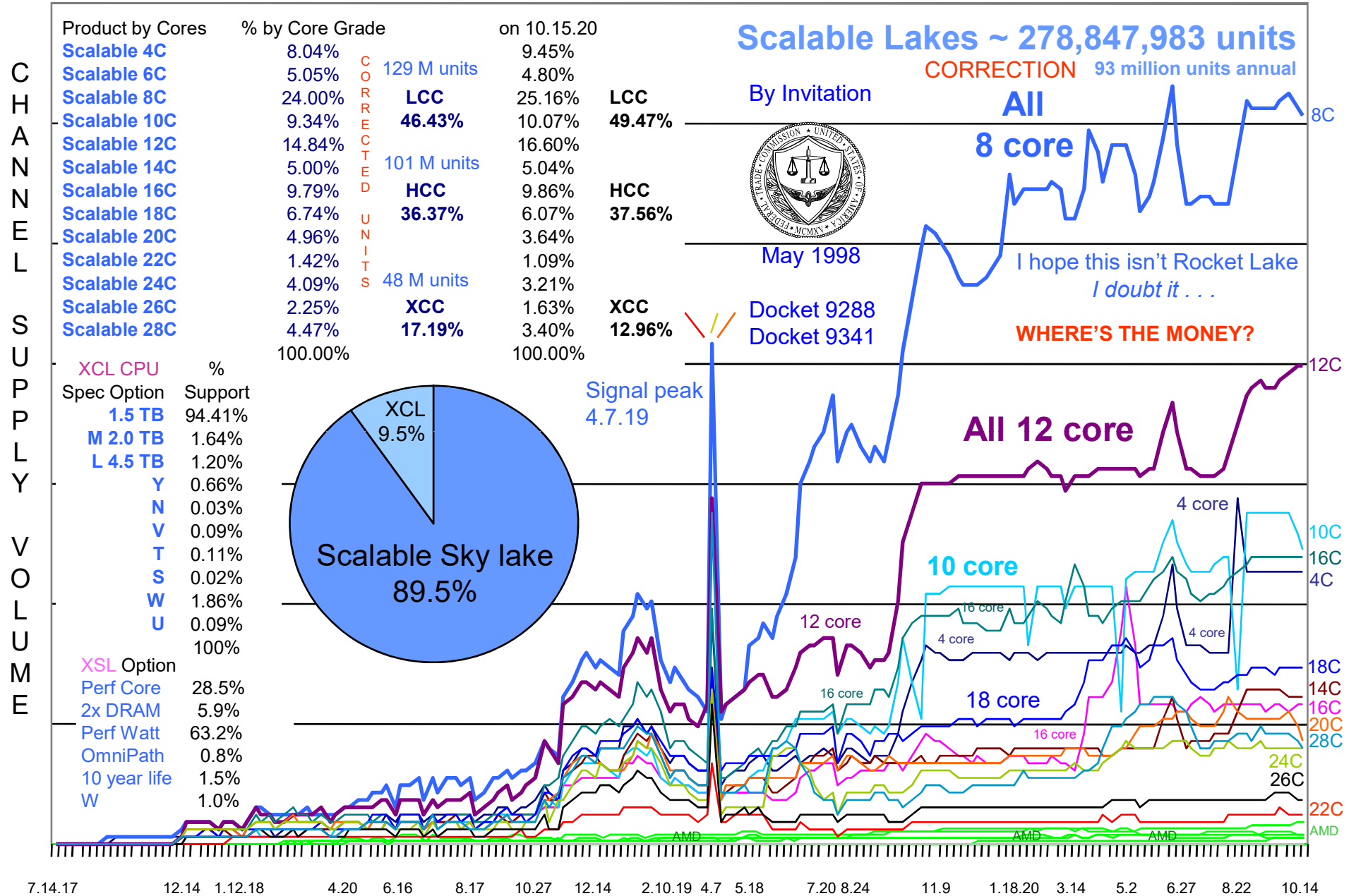
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The Art & Science of Camp Marketing

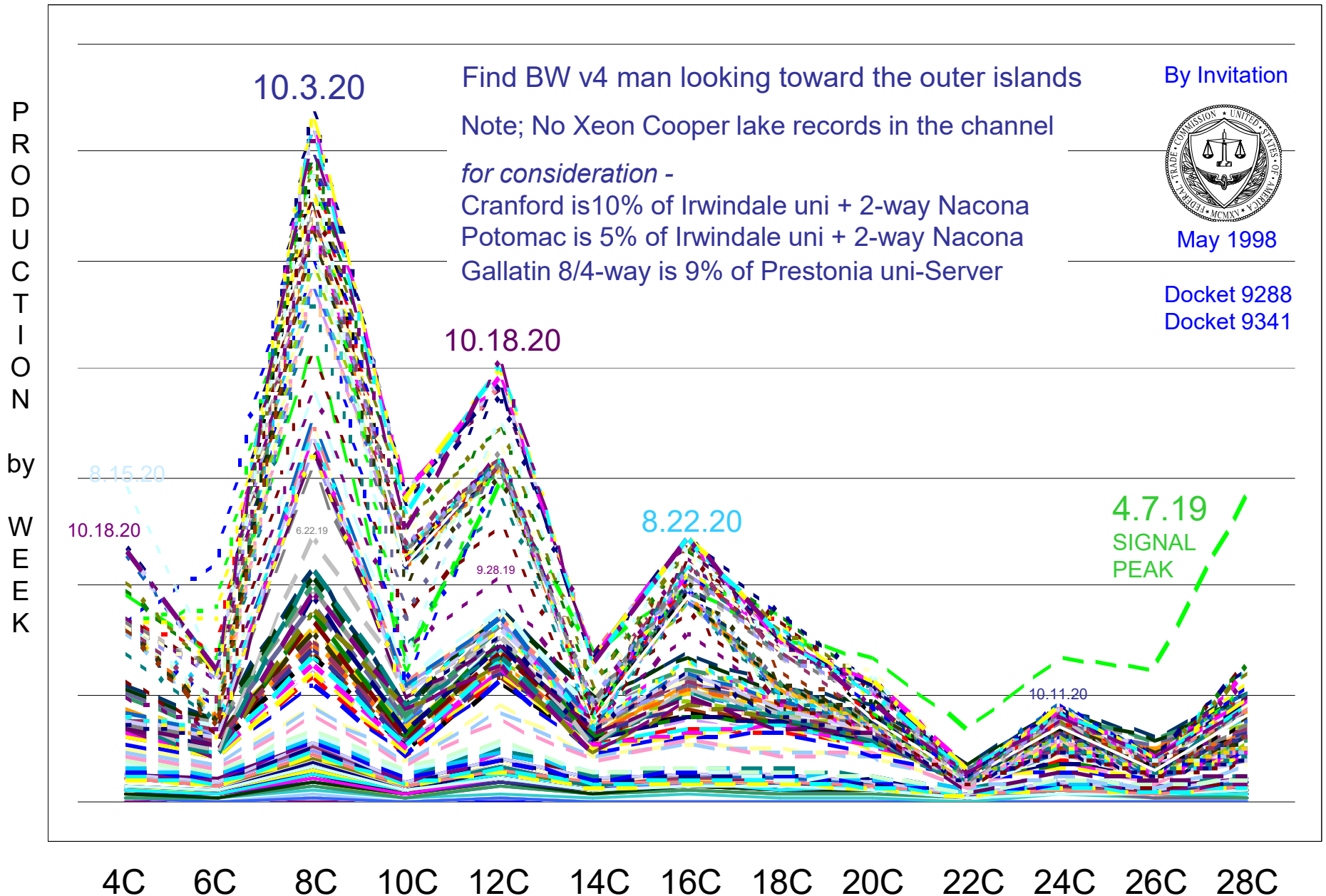
Intel Reality - Unmasking Environmental Clock Works



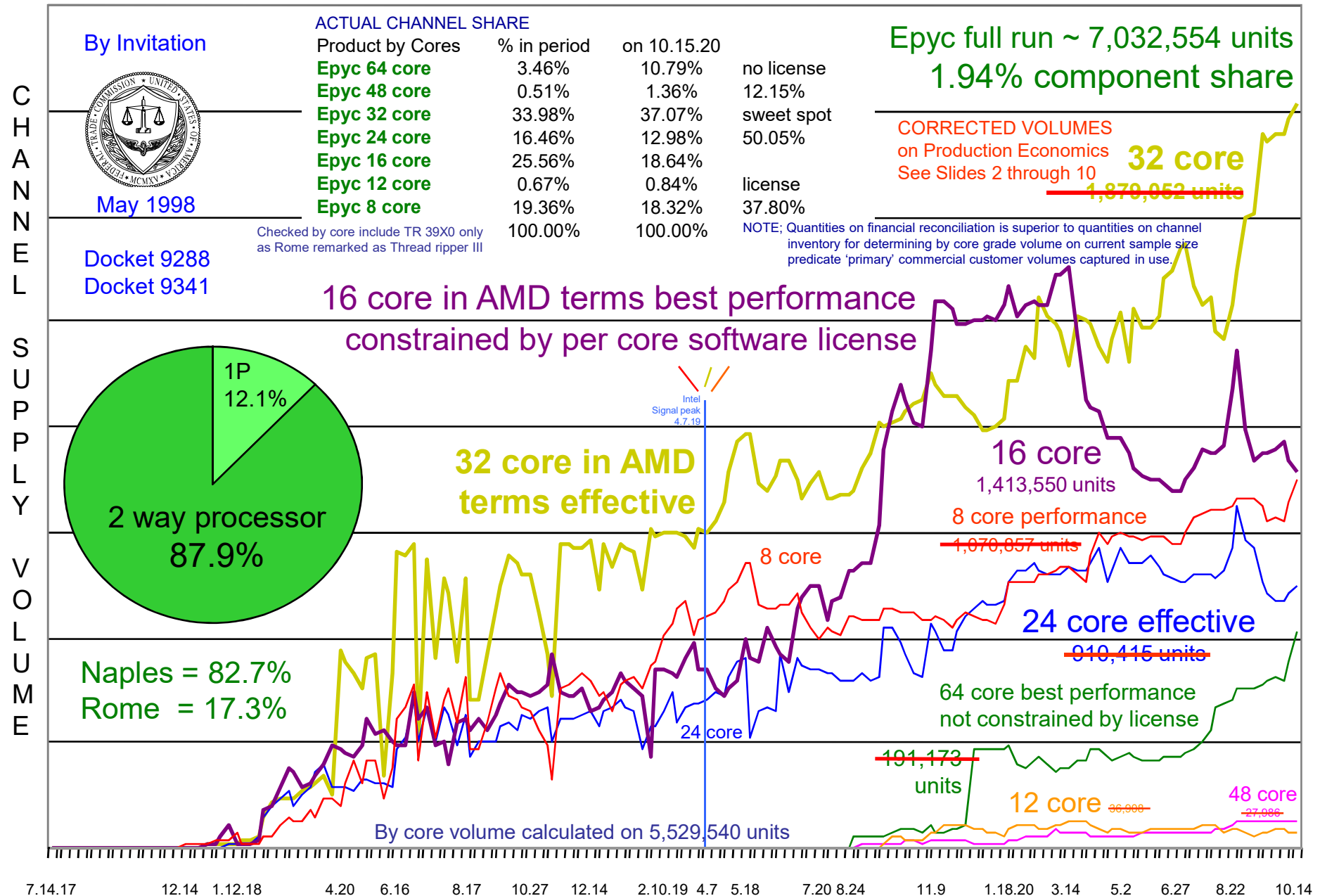
Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, Scalable on Epyc



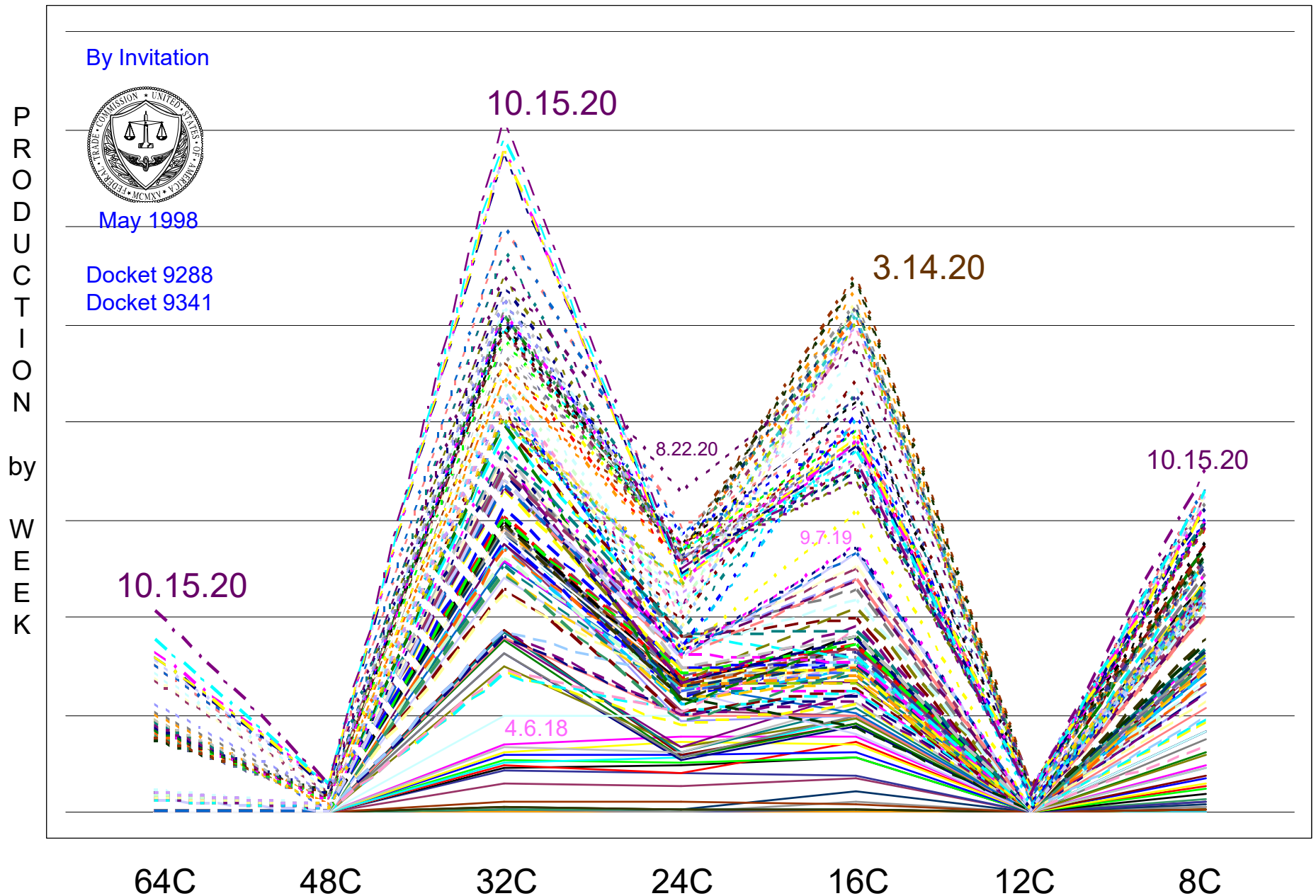
Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, **Scalable Only**



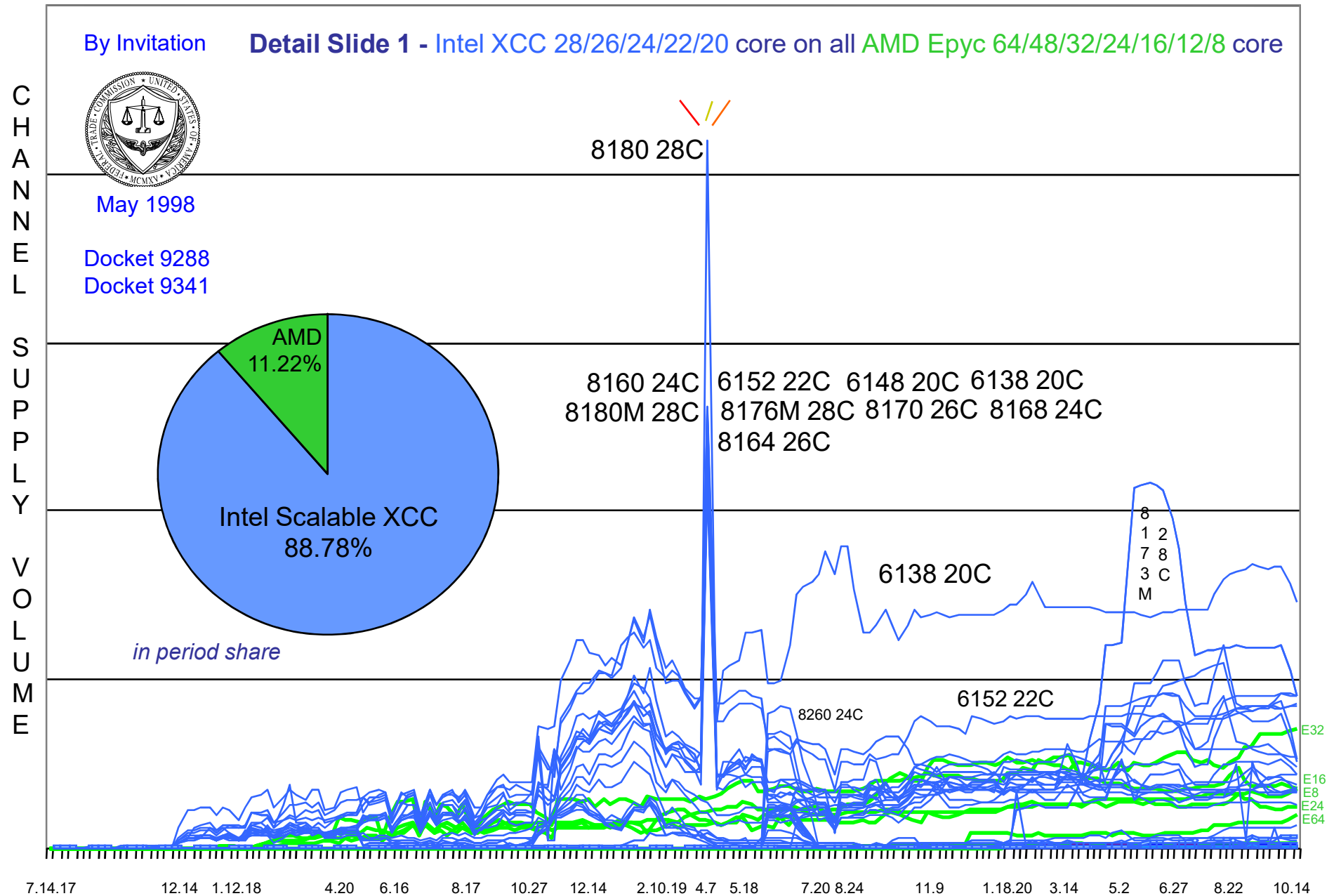
Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, AMD Epyc only



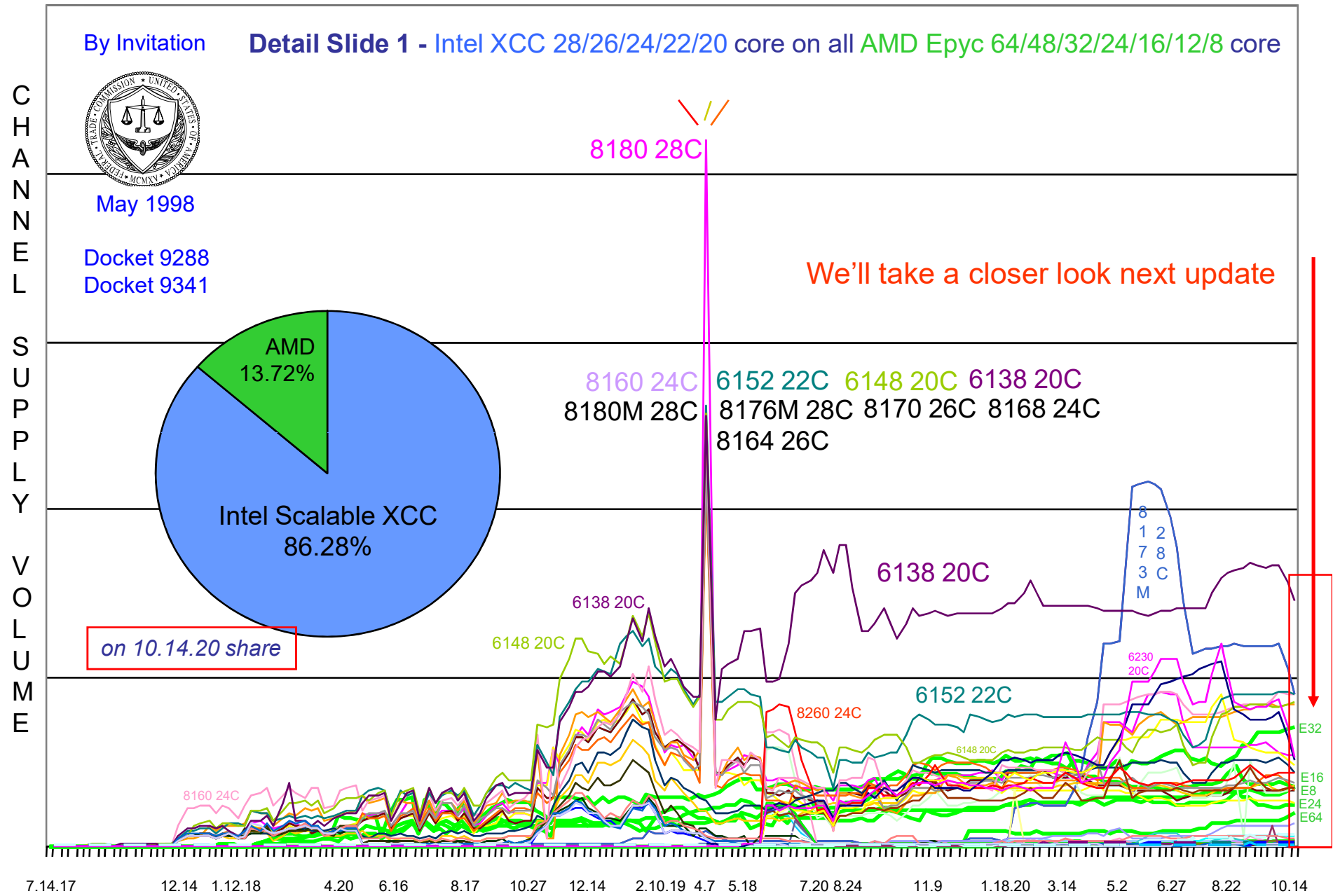
Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, AMD Epyc only



Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, XCC v Epyc only



Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, XCC v Epyc only



Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, XCC v Epyc only

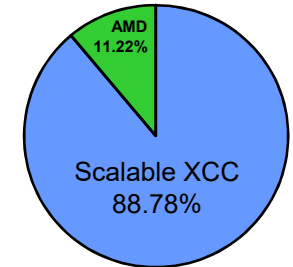
Product	in Period	% of 10.15.20	Product	in Period	% of 10.15.20
8180 28C	5.19%	3.91%	6248R	0.07%	0.45%
8180M	3.58%	1.90%	6240R	0.01%	0.06%
8176M	3.95%	2.43%	5220R	0.02%	0.09%
8173M	3.53%	6.49%	6112U	0.02%	0.04%
8176F	0.28%	0.00%	32565M	0.04%	0.24%
8280L	0.11%	0.07%	3265	0.02%	22.33%
8280M	0.16%	0.47%	6152 22C	7.35%	6.58%
8280	1.84%	2.48%	6238L	0.01%	0.01%
8276L	0.14%	0.06%	6238M	0.01%	0.03%
8276M	0.21%	0.23%	6238	0.28%	22C 0.95%
8276	0.39%	0.24%	6238T	0.04%	7.70% 0.04%
6258R	0.04%	0.24%	6148 20C	7.05%	6.18%
6236R	0.01%	0.09%	6133	0.03%	0.03%
3175X	0.06%	0.06%	6138	11.60%	10.60%
3275M	0.03%	0.19%	6148F	0.85%	0.34%
3275	0.07%	0.01%	6138F	0.61%	0.03%
8172M 26C	0.0028%	0.0000%	6138T	0.55%	0.16%
8170M	2.84%	2.66%	6248	3.10%	3.69%
8170	5.22%	6.15%	6230	3.02%	3.85%
8164	4.08%	2.44%	6230N	0.01%	0.01%
8270	0.06%	0.14%	6230T	0.00%	0.00%
8168 24C	4.06%	2.74%	6222V	0.03%	0.04%
8160M	3.62%	3.12%	6209U	0.01%	0.01%
8160	5.91%	6.48%	6210U	0.02%	0.03%
8160F	0.68%	0.06%	6242R	0.01%	0.06%
8160T	0.79%	0.03%	6222	0.01%	20C 0.04%
8268	1.66%	2.50%	5218R	0.07%	26.96% 0.39%
8260L	0.12%	0.04%	Epyc 64C	0.39%	1.48%
8260M	0.17%	0.10%	Epyc 48C	0.06%	0.19%
8260C	0.01%	0.09%	Epyc 32C	3.81%	5.08%
8260Y	0.10%	0.07%	Epyc 24C	1.85%	1.78%
8260	2.27%	3.19%	Epyc 16C	2.87%	2.56%
8256	0.16%	0.14%	Epyc 12C	0.07%	All Epyc 0.11%
6262V	0.02%	0.04%	Epyc 8C	2.17%	11.22% 2.51%
6252	2.58%	3.45%		100.00%	100.00%
6252N	0.01%	0.01%			

By Invitation

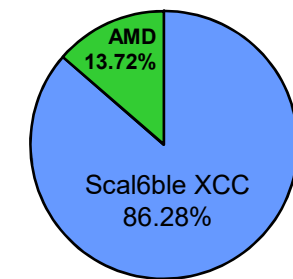


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Docket 9341



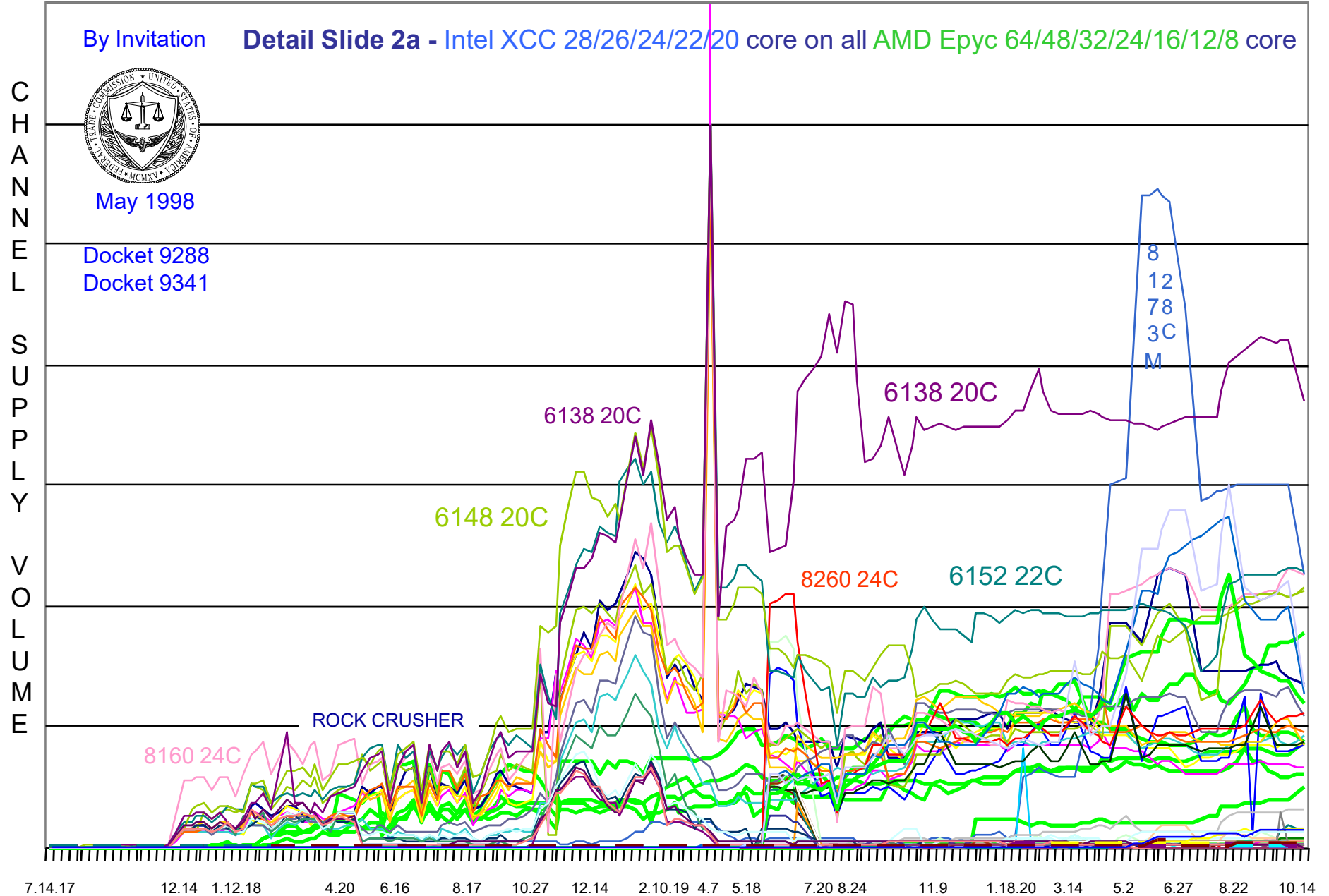
in period share



on 10.14.20 share

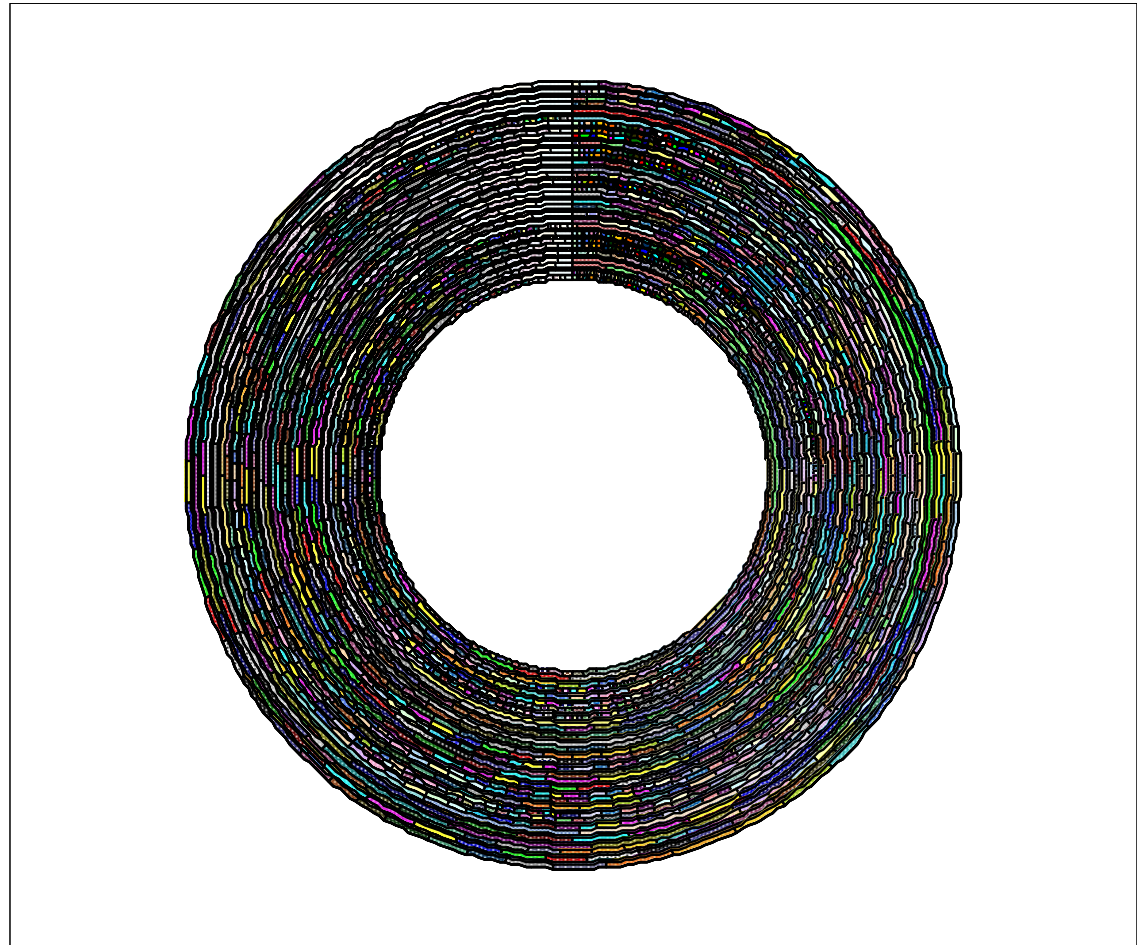
certain grade SKU clarifications

Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, XCC v Epyc only



Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, XCC v Epyc only

Only the best prepared data scientists, informed of course, on computer science so informed on image assessment, dGPU and similar tools, can decipher the next Slide. It' actually not this difficult . . . mb



1,183,282 data samples
over 170 weeks, recorded
across 100 grade SKUs is a
statistically relevant sample

Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, XCC/HCC v Epyc

Product	in Period	% of 10.15.20		Product	in Period	% of 10.15.20	
8180 28C	2.833%	1.94%		6248R	0.040%	0.22%	
8180M	1.957%	0.94%		6240R	0.006%	0.03%	
8176M	2.157%	1.21%		5220R	0.012%	0.04%	
8173M	1.929%	3.23%		6112U	0.011%	0.02%	
8176F	0.151%	0.00%		32565M	0.021%	0.12%	24C
8280L	0.060%	0.04%		3265	0.009%	12.20%	0.00%
8280M	0.085%	0.24%		6152 22C	4.017%	3.27%	11.42%
8280	1.004%	1.24%		6238L	0.005%	0.01%	
8276L	0.077%	0.03%		6238M	0.008%	0.01%	
8276M	0.113%	0.11%		6238	0.155%	0.47%	22C
8276	0.216%	0.12%		6238T	0.020%	4.20%	0.02%
6258R	0.023%	0.12%		6148 20C	3.852%	3.07%	3.79%
6238R	0.004%	0.04%		6133	0.016%	0.01%	
3175X	0.033%	0.03%		6138	6.335%	5.28%	
3275M	0.016%	28C	0.09%	28C	6148F	0.462%	0.17%
3275	0.039%	10.70%	0.01%	28C	6138F	0.335%	0.01%
8172M 26C	0.002%	0.0000%		6138T	0.298%	0.08%	
8170M	1.553%	1.32%		6248	1.692%	1.84%	
8170	2.849%	3.06%		6230	1.648%	1.92%	
8164	2.229%	26C	1.22%	26C	6230N	0.003%	0.01%
8270	0.035%	6.67%	0.07%	26C	6230T	0.000%	0.00%
8168 24C	2.217%	1.37%		6222V	0.015%	0.02%	
8160M	1.979%	1.55%		6209U	0.004%	0.01%	
8160	3.226%	3.22%		6210U	0.011%	0.01%	
8160F	0.369%	0.03%		6242R	0.008%	0.03%	20C
8160T	0.432%	0.01%		6222	0.004%	14.683%	0.02%
8268	0.904%	1.24%		5218R	0.039%	0.19%	12.48%
8260L	0.066%	0.02%		6154	3.677%	5.44%	
8260M	0.092%	0.05%		6150	4.576%	3.61%	
8260C	0.005%	0.04%		6140M	2.035%	2.14%	
8260Y	0.057%	0.04%		6140	5.905%	4.38%	
8260	1.239%	1.59%		6240L	0.005%	0.01%	
8256	0.088%	0.07%		6240M	0.010%	0.01%	
6262V	0.010%	0.02%		6240	1.135%	1.65%	
6252	1.409%	1.72%		6240C	0.010%	0.01%	
6252N	0.005%	0.01%		6240Y	0.084%	0.09%	

By Invitation



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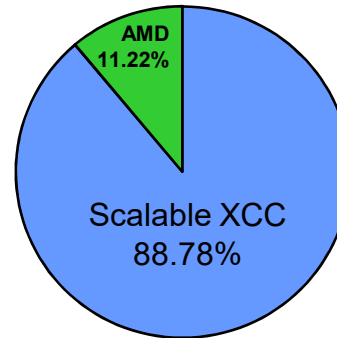
Docket 9341

ADDS Intel Scalable
HCC 18/16 Core only
completes next page

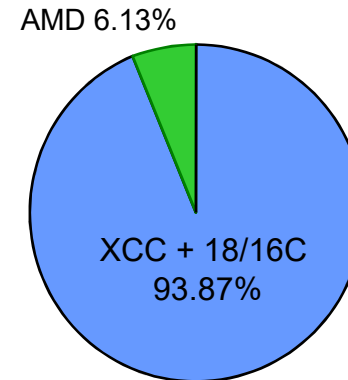
Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, XCC/HCC v Epyc

Product	in Period		% of 10.15.20	
5220S	0.007%		0.02%	
2195	0.071%	18C	0.08%	
2295	0.002%	17.555%	0.01%	17.65%
8153	2.574%		1.17%	
8124	0.043%		0.11%	
6143	0.016%		0.04%	
6142	5.796%		6.95%	
6142M	2.097%		2.05%	
6130	13.094%		15.93%	
6142F	0.125%		0.01%	
6130F	0.275%		0.01%	
8253	1.023%		1.34%	
5218N	0.003%		0.01%	
5218B	0.003%		0.01%	
5218	1.435%		2.37%	
5218T	0.008%		0.02%	
6208U	0.001%		0.00%	
6246R	0.025%		0.14%	
6226R	0.059%		0.44%	
4216	1.255%		2.06%	
3245M	0.001%	16C	0.01%	16C
3245	0.035%	27.869%	0.09%	32.78%
Epyc 64C	0.21%		0.74%	
Epyc 48C	0.03%		0.09%	
Epyc 32C	2.08%		2.53%	
Epyc 24C	1.01%		0.89%	
Epyc 16C	1.57%		1.27%	
Epyc 12C	0.04%	All Epyc	0.06%	All Epyc
Epyc 8C	1.19%	6.13%	1.25%	6.83%
	100.00%		100.00%	

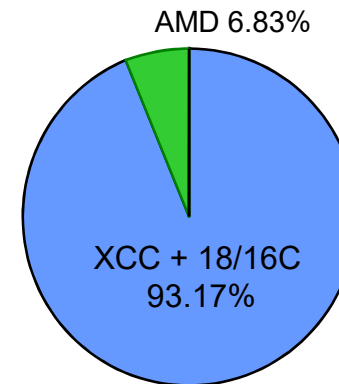
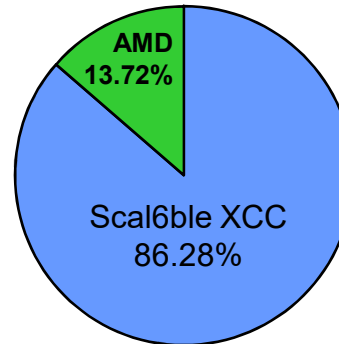
XCC only



XCC + 18/16 Core



in period share



on 10.14.20 share

By Invitation



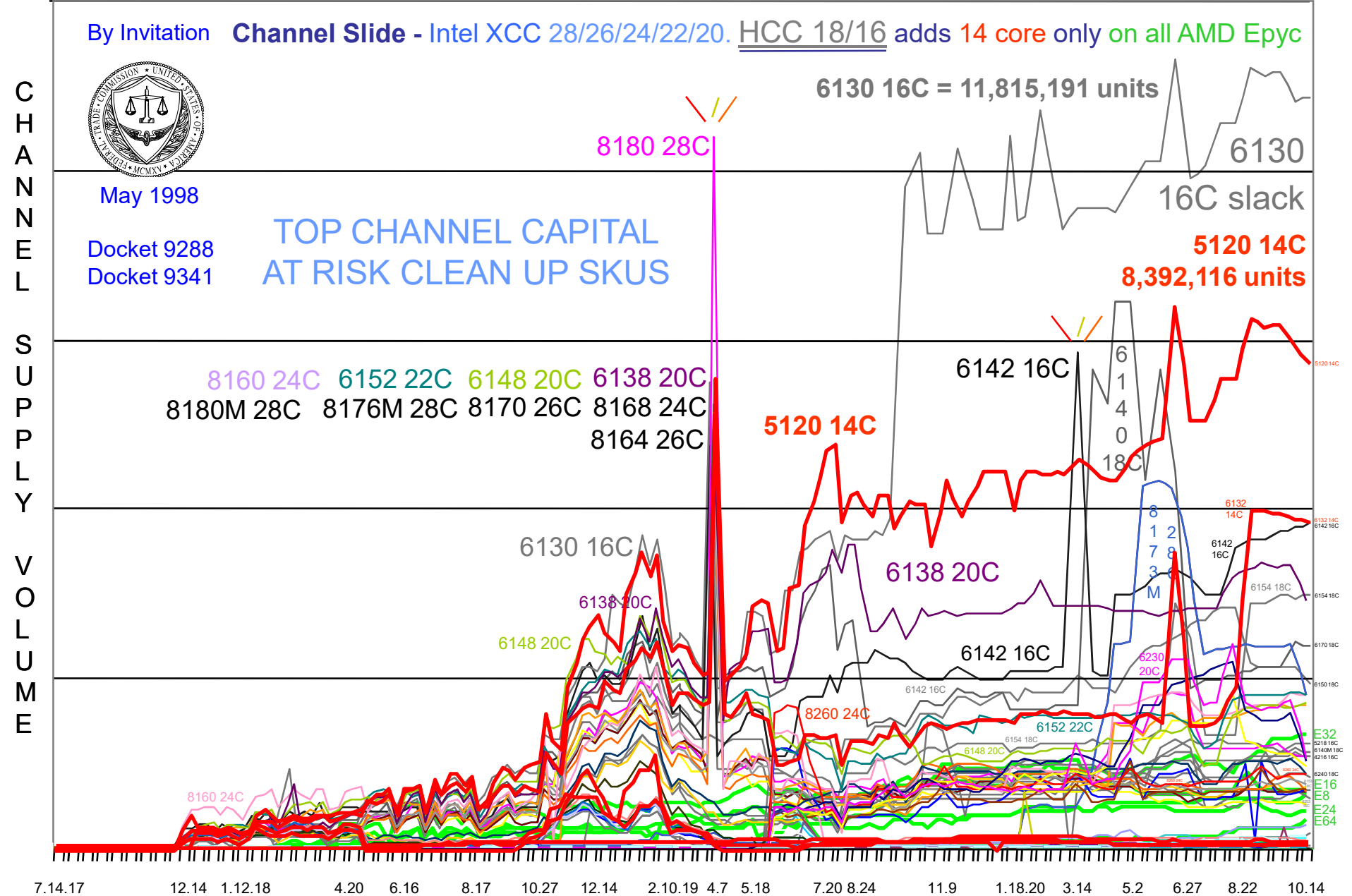
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Docket 9288

Docket 9341

An environment where hard work works the worker out of work, price systems redistribute wealth without regard to worldly virtues, capital accumulation and net worth disappears in deflation, earned interest and pensions evaporate in inflation, where the speculator and manipulator reap the rewards of competitive elimination through forms of monopoly economic theft that tends to shift an industrial market's relative values. Camp Marketing Consultancy for Federal Trade Commission, Senate Edition, January 2003

Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, XCC/HCC v Epyc



Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, XCC/HCC/LCC

By Invitation Channel Slide- Intel XCC 28/26/24/22/20, HCC 18/16/14/12 adds 10 core on all AMD Epyc



May 1998

TOP CHANNEL CAPITAL AT RISK CLEAN UP SKUS

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Docket 9341

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4114 10C
13,535,783 units

5118 12C
14,221,169 units

8180 28C

6130 16C 11,815,191 units

6130 16C slack

5115 10C 8.3 M Units

5120 14C
8,392,116 units

8160 24C 6152 22C 6148 20C 6138 20C
8180M 28C 8176M 28C 8170 26C 8168 24C
8164 26C

6130 16C

6148 20C

6138 20C

6142 16C

6142 16C

6152 22C

8168 24C

6260 24C

6142 16C

6152 22C

6230

6142 16C

6154 18C

6170 18C

6150 18C

6210 10C

6214 12C

E32

6148 16C

6148 16C

6148 16C

E16

E8

E24

E64

7.14.17 12.14 1.12.18 4.20 6.16 8.17 10.27 12.14 2.10.19 4.7 5.18 7.20 8.24 11.9 1.18.20 3.14 5.2 6.27 8.22 10.14

Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, XCC/HCC/LCC

By Invitation



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Xeon Scalable Skylake and Cascade lake ranked for channel inventory management AT RISK capital assessment vis-à-vis Xeon Ice Lake, Sapphire Rapids and AMD Epyc

Xeon Scalable Lakes	
Core Category	Total Volume
28 Core	12,464,505
26C	6,274,080
24C	11,404,883
22C	3,959,641
20C	13,830,860
18C	18,794,354
16C	27,299,218
14C	13,942,399
12C	41,381,041
10C	26,044,402
8C	66,923,516
6C	14,081,823
4C	22,447,263
	278,847,983

Xeon Scalable Lakes	
Core Category	Total Volume
8 Core	66,923,516
12C	41,381,041
16C	27,299,218
10C	26,044,402
4C	22,447,263
18C	18,794,354
6C	14,081,823
14C	13,942,399
20C	13,830,860
28C	12,464,505
24C	11,404,883
26C	6,274,080
22C	3,959,641
	278,847,983

“The central fact of industrial economics is not profit but loss - not the expectation of ending up with a surplus, its justification, and the legitimacy of the claims to a share in it; but the inevitable and real risk of ending up with an *impoverishing deficit*, and the need, the absolute need, to avoid this loss by providing against the risks”. Peter Drucker. The New Society, 1950

Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, XCC/HCC/LCC

Product	in Period	% of 10.15.20						
8180 28C	0.899%	0.53%		5220R	0.004%	0.01%		
8180M	0.621%	0.26%		6112U	0.004%	0.01%		
8176M	0.685%	0.33%		32565M	0.007%	24C	0.03%	24C
8173M	0.612%	0.88%		3265	0.003%	3.87%	0.00%	3.12%
8176F	0.048%	0.00%		6152 22C	1.275%		0.89%	
8280L	0.019%	0.01%		6238L	0.002%		0.00%	
8280M	0.027%	0.06%		6238M	0.003%		0.00%	
8280	0.318%	0.34%		6238	0.049%	22C	0.13%	22C
8276L	0.025%	0.01%		6238T	0.006%	1.33%	0.01%	1.04%
8276M	0.036%	0.03%		6148 20C	1.222%		0.84%	
8276	0.068%	0.03%		6133	0.005%		0.00%	
6258R	0.007%	0.03%		6138	2.010%		1.44%	
6238R	0.001%	0.01%		6148F	0.147%		0.05%	
3175X	0.010%	28C	0.01%	28C	6138F	0.106%	0.00%	
3275M	0.005%		0.03%		6138T	0.095%	0.02%	
3275	0.012%	3.39%	0.00%	2.57%	6248	0.537%	0.50%	
8172M 26C	0.000%	0.0000%		6230	0.523%		0.52%	
8170M	0.493%	0.36%		6230N	0.001%		0.00%	
8170	0.904%	0.84%		6230T	0.000%		0.00%	
8164	0.707%	26C	0.33%	26C	6222V	0.005%	0.01%	
8270	0.011%	2.12%	0.02%	1.55%	6209U	0.001%	0.00%	
8168 24C	0.704%	0.37%		6210U	0.003%		0.00%	
8160M	0.628%	0.42%		6242R	0.002%	20C	0.01%	20C
8160	1.024%	0.88%		6222	0.001%	4.659%	0.01%	3.41%
8160F	0.117%	0.01%		5218R	0.012%		0.05%	
8160T	0.137%	0.00%		6154	1.167%		1.49%	
8268	0.287%	0.34%		6150	1.452%		0.99%	
8260L	0.021%	0.01%		6140M	0.646%		0.58%	
8260M	0.029%	0.01%		6140	1.874%		1.20%	
8260C	0.002%	0.01%		6240L	0.002%		0.00%	
8260Y	0.018%	0.01%		6240M	0.003%		0.00%	
8260	0.393%	0.43%		6240	0.360%		0.45%	
8256	0.028%	0.02%		6240C	0.003%		0.00%	
6262V	0.003%	0.01%		6240Y	0.027%		0.02%	
6252	0.447%	0.47%		5220S	0.002%		0.01%	
6252N	0.002%	0.00%		2195	0.023%	18C	0.02%	
6248R	0.013%	0.06%		2295	0.001%	5.570%	0.00%	4.82%
6240R	0.002%	0.01%						

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Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, XCC/HCC/LCC

Product	in Period	% of 10.15.20						
8153	0.817%		0.32%	6226	0.049%		0.27%	
8124	0.014%		0.03%	6256	0.000%		0.00%	
6143	0.005%		0.01%	4214	0.448%		0.65%	
6142	1.839%		1.90%	4214Y	0.013%		0.00%	
6142M	0.665%		0.56%	4214R	0.013%		0.06%	
6130	4.155%		4.36%	2265	0.003%	12C	0.03%	12C
6142F	0.040%		0.00%	3235	0.019%	14.379%	0.02%	15.80%
6130F	0.087%		0.00%	5115	2.926%		2.89%	
8253	0.325%		0.37%	4114	4.760%		5.11%	
5218N	0.001%		0.00%	4114T	0.203%		0.08%	
5218B	0.001%		0.00%	5215L	0.044%		0.03%	
5218	0.455%		0.65%	5115M	0.043%		0.03%	
5218T	0.003%		0.01%	5215	0.174%		0.41%	
6208U	0.000%		0.00%	4210	0.647%		0.85%	
6246R	0.008%		0.04%	4210R	0.019%		0.08%	
6226R	0.019%		0.12%	2255	0.006%		0.03%	
4216	0.398%		0.56%	2155	0.043%	10C	0.04%	10C
3245M	0.000%	16C	0.00%	2150B	0.011%	8.874%	0.04%	9.58%
3245	0.011%	8.843%	0.02%	6144	1.109%		1.22%	
6132	1.390%		1.86%	6137	0.018%		0.02%	
5120	2.951%		2.78%	6135	0.001%		0.00%	
5117	0.073%		0.04%	6134	3.937%		3.81%	
5117F	0.006%		0.01%	6135M	0.000%		0.00%	
5120T	0.133%		0.03%	6134M	0.709%		0.39%	
5119T	0.160%		0.04%	4110	6.405%		6.71%	
2275	0.002%	14C	0.01%	4108	4.204%		4.72%	
2175	0.020%	4.736%	0.03%	3106	4.798%		5.13%	
8158	0.880%		0.54%	4109T	0.324%		0.25%	
6146	0.923%		0.66%	6250	0.001%		0.01%	
6136	2.200%		2.93%	6244	0.339%		0.37%	
6126	2.348%		3.21%	6234	0.059%		0.11%	
5118	5.001%		5.37%	5217	0.187%		0.31%	
6126F	0.142%		0.03%	4208	0.221%		0.34%	
6126T	0.097%		0.01%	4215R	0.007%		0.02%	
4116	2.012%		1.78%	2245	0.005%		0.02%	
4116T	0.193%		0.08%	3225	0.008%	8C	0.00%	8C
6246	0.038%		0.17%	3223	0.020%	22.352%	0.01%	23.46%

By Invitation



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Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, XCC/HCC/LCC

Product	in Period	% of 10.15.20	
2235	0.012%		0.03%
2145	0.077%		0.07%
2140B	0.012%		0.04%
2135	0.070%		0.04%
2133	0.250%	6C	0.08%
5118	5.001%	9.87%	5.37%
2125	0.113%		0.09%
2123	0.237%		0.04%
2104	0.084%		0.05%
2102	0.069%		0.13%
8156	0.807%		0.47%
5122	3.888%		5.28%
4112	2.036%		2.36%
5222	0.757%		0.50%
2225	0.031%	4C	0.03%
2223	0.042%	8.064%	0.05%
Epyc 64C	0.07%		0.20%
Epyc 48C	0.01%		0.03%
Epyc 32C	0.66%		0.69%
Epyc 24C	0.32%		0.24%
Epyc 16C	0.50%		0.35%
Epyc 12C	0.01%	All Epyc	0.02%
Epyc 8C	0.38%	1.94%	0.34%
	100.00%		100.00%

By Invitation



May 1998

Docket 9288
Docket 9341

“A [near] monopolistic company may be especially privileged by insisting on longer (production) runs without incurring the loss of large stocks. This can be done by the simple expedient of *holding the customers to ransom and making them accommodate the stocks.*

It’s fortunate for national economies that few companies are in a position to get away with this for it ties up unnecessary amounts of capital”.

- Stanford Beer, Decision & Control, 1966

Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, XCC/HCC v Epyc

CHANNEL SUPPLY VOLUME

Primary Epyc Competitors 8/4-way

- 4216 16C/32t, 2.1 to 3.2 GHz, 16.5 MB L3, 2-way, 100w
- 5218 16C/32t, 2.3 to 3.9 GHz, 22 MB L3, 4-way, 125w
- 8153 16C/32t, 2.0 to 2.8 GHz, 22 MB L3, 8-way, 125w
- 8253 16C/32t, 2.0 to 3.0 GHz, 35.75 MB L3, 8-way, 165w
- 6140M (2 TB) 18C/36t, 2.3 to 3.7 GHz, 24.75 MB L3, 4-way, 140w
- 6240 18C/32t, 2.6 to 2.9 GHz, 24.75 MB L3, 4-way, 150w
- 8160M (2 TB) 24C/48t, 2.1 to 3.7 GHz, 33 MB L3, 8-way, 150w
- 8164 24C/48t, 2.0 to 3.7 GHz, 37.75 MB L3, 8-way, 150w
- 8260 24C/48t, 2.4 to 3.9 GHz, 25.75 MB L3, 8-way, 165w
- 8268 24C/48t, 2.9 to 3.9 GHz, 35.75 MB L3, 8-way, 205w
- 8170M (2 TB) 26C/52t, 2.1 to 3.7 GHz, 35.75 MB L3, 8-way, 165w
- 8173M (2 TB) 26C/52t, 2.0 to 3.5 GHz, 38.5 MB L3, 8-way, 165w
- 8276L (4.5 TB), 28C/56t, 2.2 to 4.0 GHz, 38.5 MB L3, 8-way, 165w
- 8180M (2 TB) 28C/56t, 2.5 to 3.8 GHz, 38.5 MB L3, 8-way, 205w
- 8280 28C/56t, 2.7 to 4.0 GHz, 38.5 MB L3, 8-way, 205w

By Invitation

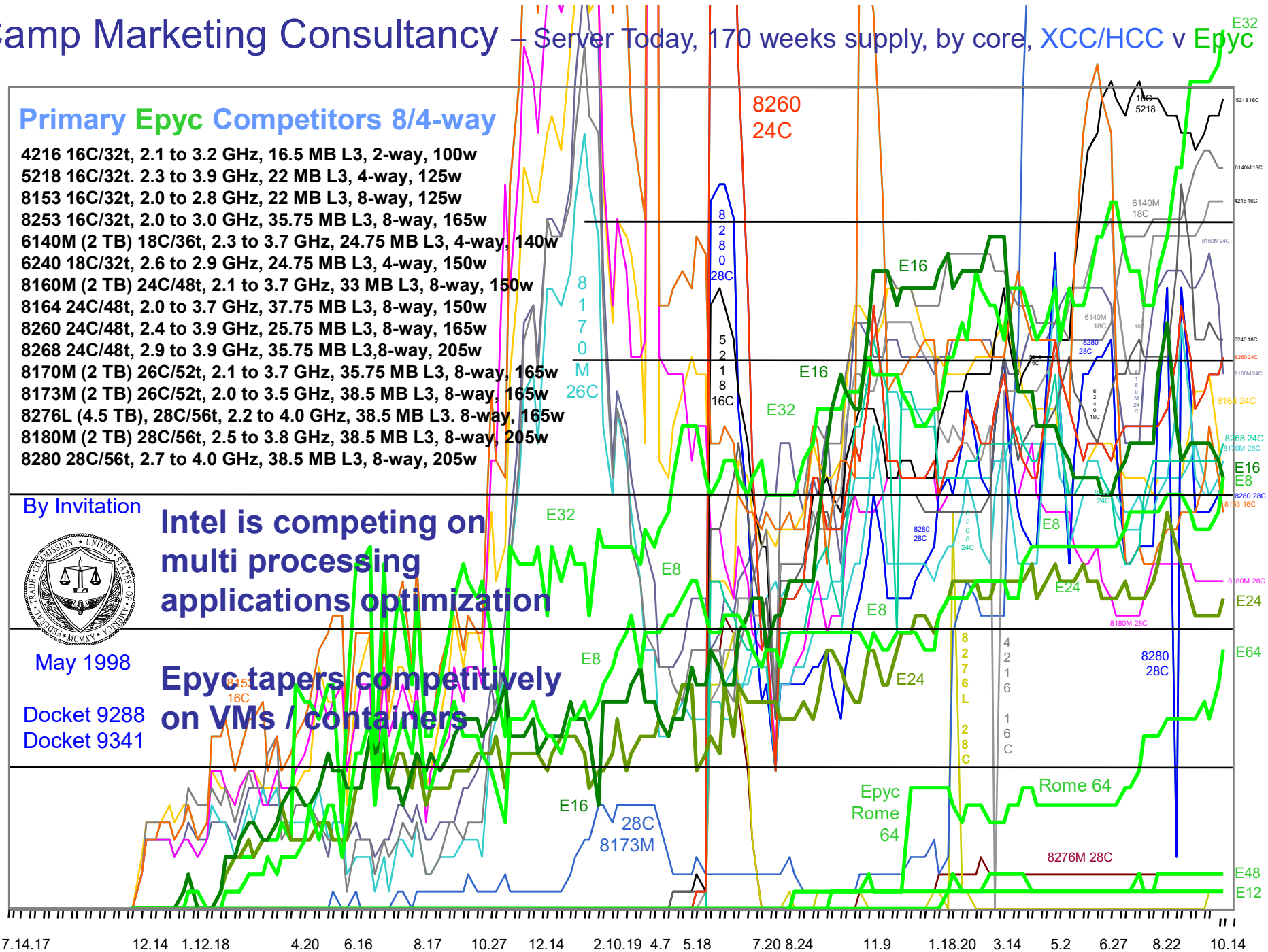


Intel is competing on multi processing applications optimization

May 1998

Docket 9288
Docket 9341

Epyc tapers competitively on VMs / containers



Camp Marketing Consultancy – Server Today, 170 weeks supply, by core, XCC/HCC v Epyc

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Primary Epyc Competitors 8/4-way

- 4216 16C/32t, 2.1 to 3.2 GHz, 16.5 MB L3, 2-way, 100w
- 5218 16C/32t, 2.3 to 3.9 GHz, 22 MB L3, 4-way, 125w
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- 8280 28C/56t, 2.7 to 4.0 GHz, 38.5 MB L3, 8-way, 205w

By Invitation



Intel is competing on multi processing applications optimization

May 1998

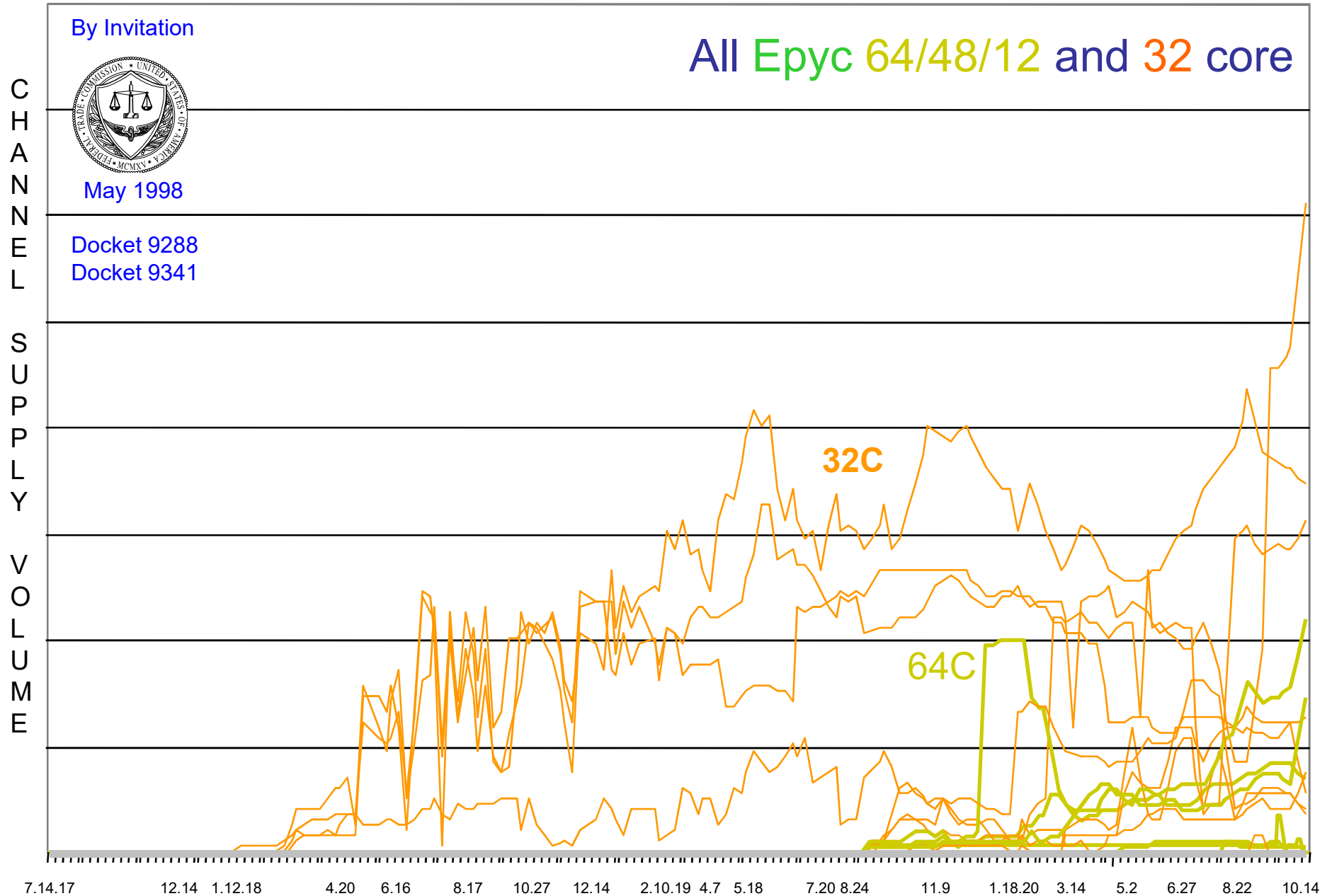
Epyc tapers competitively on VMs / containers, aims for database next step up proximate storage server

Docket 9288
Docket 9341

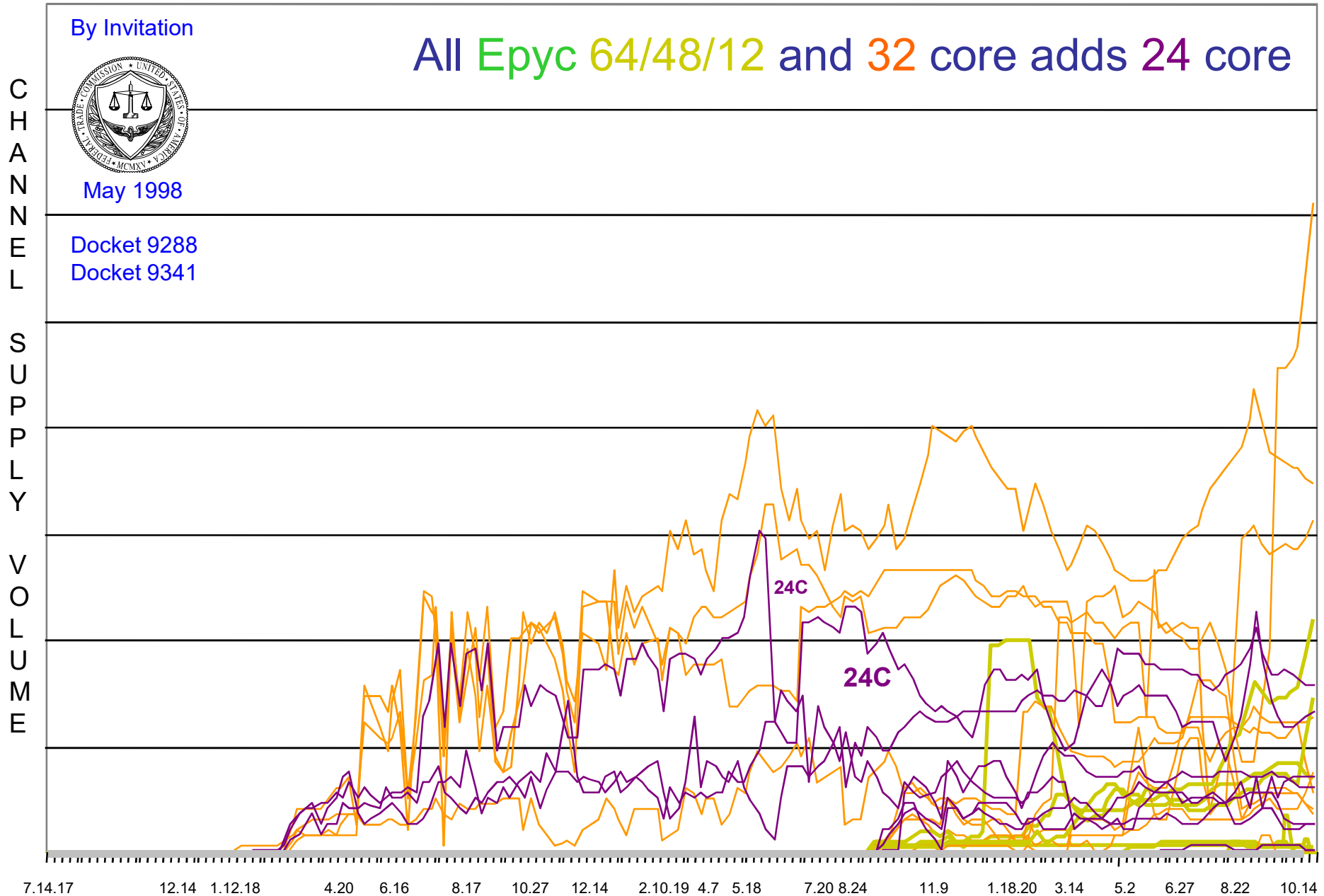
Epyc bunker by grade SKU

7.14.17 12.14 1.12.18 4.20 6.16 8.17 10.27 12.14 2.10.19 4.7 5.18 7.20 8.24 11.9 1.18.20 3.14 5.2 6.27 8.22 10.14

Camp Marketing Consultancy – Server Today, 170 weeks supply, Epyc by grade SKU



Camp Marketing Consultancy – Server Today, 170 weeks supply, Epyc by grade SKU



Camp Marketing Consultancy – Server Today, 170 weeks supply, Epyc by grade SKU

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All Epyc 64/48/12 and 32/24 core adds 16C

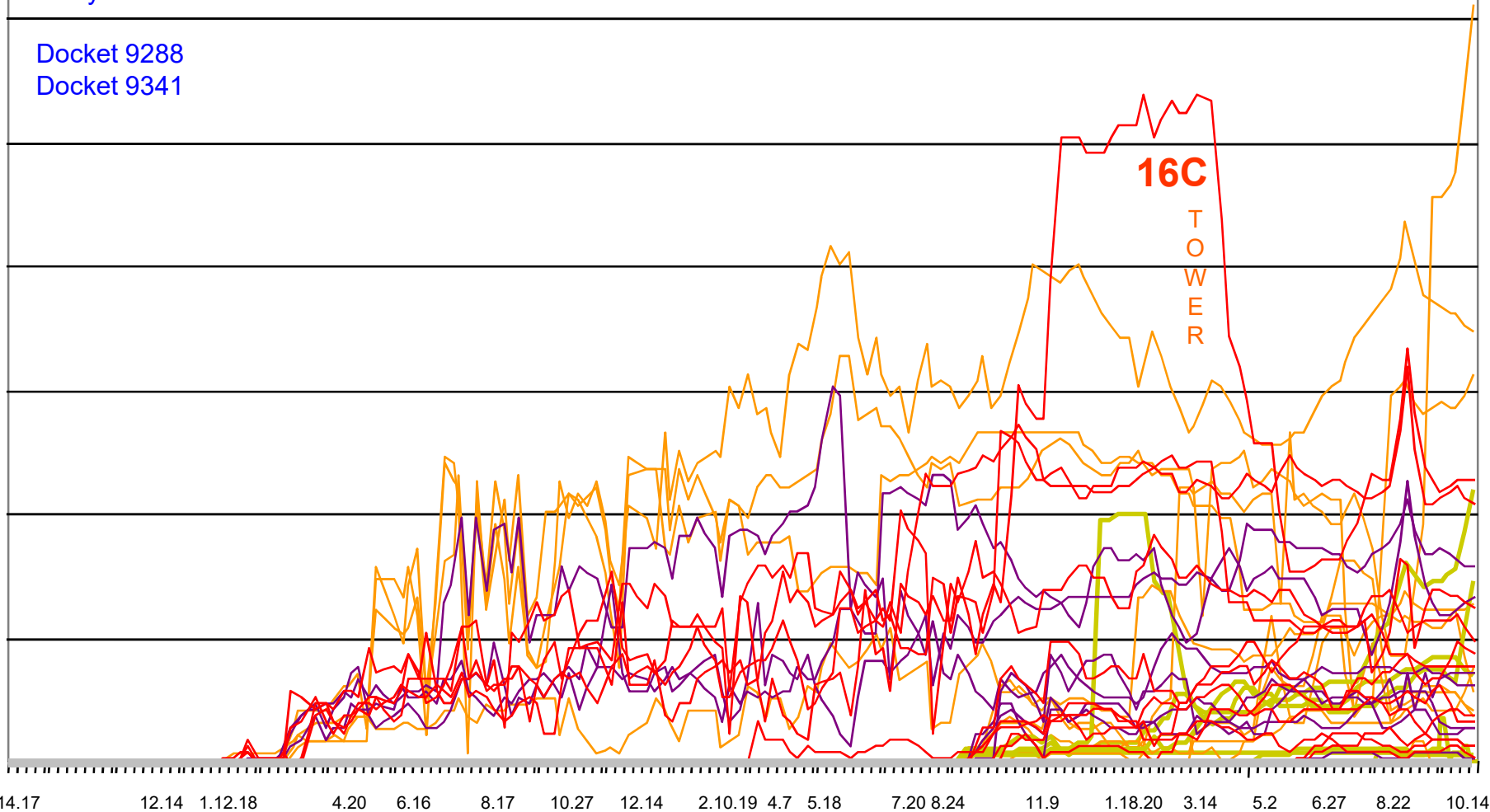
Analysis, Intel competes with Rome 64C on multiprocessing
28C x 2/4 way, 16C x 4-way, 8C x 8-way

Docket 9288
Docket 9341

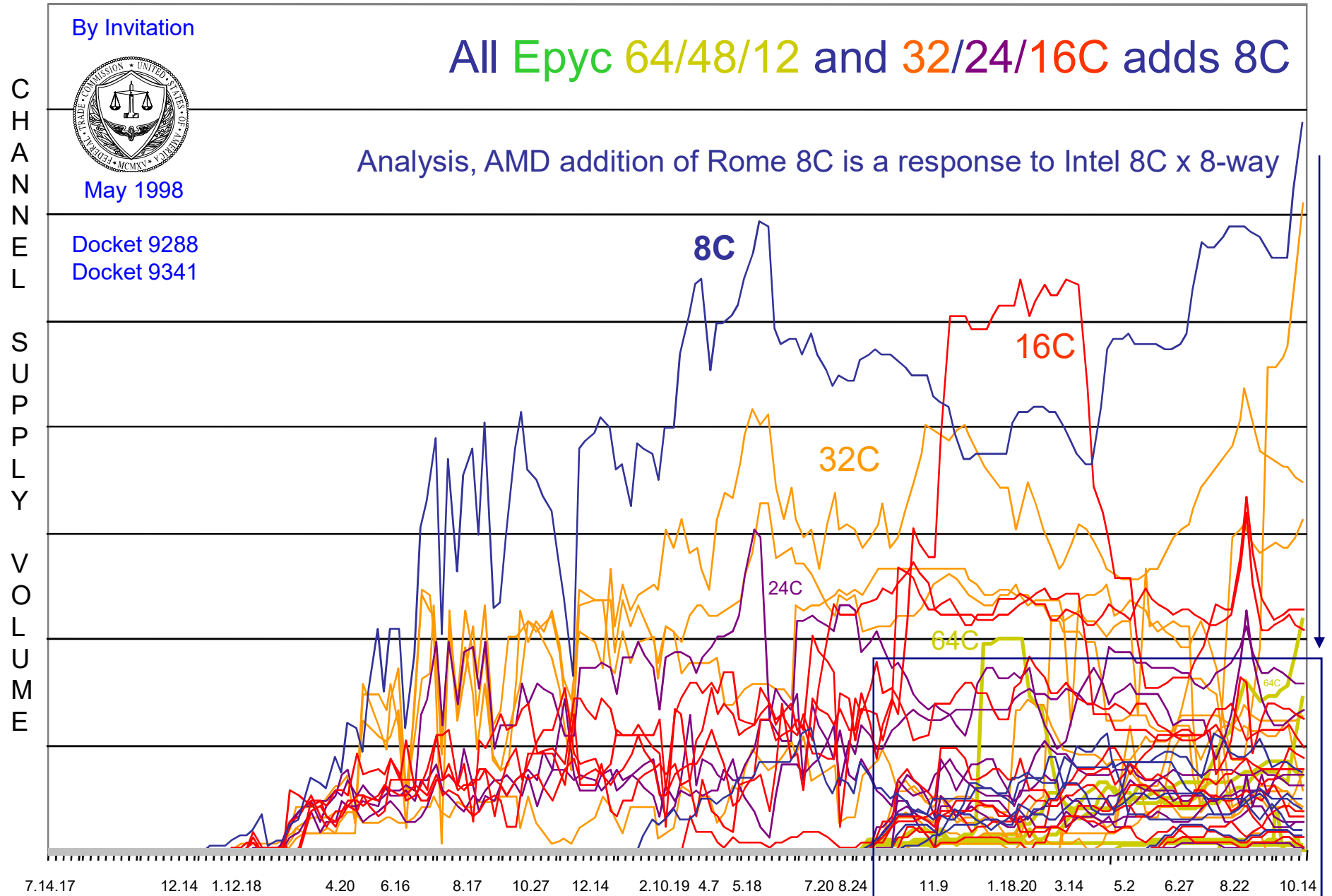
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Camp Marketing Consultancy – Server Today, 170 weeks supply, Epyc by grade SKU



Camp Marketing Consultancy – Server Today, 170 weeks supply, Epyc by grade SKU

Note: Checked, slight by category % difference between Slide 5 'core grades' and here, is 'Core Grades' include Thread ripper 30x0 only as Rome remarked. Percent by Grade SKU shown here is Epyc Rome and Naples only.

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May 1998

Docket 9288
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Epycs = 7,032,554 units

Grade SKU	% in Period	% on 10.14.20	Core Count
7K72	0.00%	0.00%	
7V12	0.03%	0.11%	
7H12	0.08%	0.11%	
7742	0.63%	3.24%	
7662	0.05%	0.11%	
7702	1.45%	4.92%	64 core
7702P	0.68%	1.56%	10.06%
7642	0.25%	0.67%	48 core
7552	0.28%	0.78%	1.45%
7542	0.41%	1.79%	
7532	0.02%	0.11%	
7502	1.04%	1.34%	
7502P	0.72%	1.01%	
7452	2.74%	13.74%	
7601	8.34%	7.04%	
7551	10.75%	7.82%	
7551P	2.57%	0.89%	32 core
7501	7.00%	2.91%	36.65%
7F72	0.05%	0.11%	
7402	0.97%	1.68%	
7402P	0.79%	0.67%	
7352	0.58%	0.67%	
7451	6.28%	3.58%	
7401	3.95%	3.02%	24 core
7401P	2.86%	1.45%	11.17%
7F52	0.06%	0.11%	
7302	1.54%	2.79%	
7302P	0.94%	2.01%	
7282	0.58%	0.78%	
7381	0.00%	0.00%	
7371	0.54%	0.34%	
7351	7.43%	5.14%	
7351P	4.64%	1.79%	
7301	4.82%	2.23%	16 core
7281	6.02%	4.69%	19.89%
7272	0.69%	0.89%	0.89%
7F32	0.11%	0.34%	
7262	1.23%	1.68%	
7252	0.75%	1.12%	
7232P	0.64%	0.89%	
7261	1.43%	0.45%	8 core
7251	16.06%	15.42%	19.89%
	100.00%	100.00%	

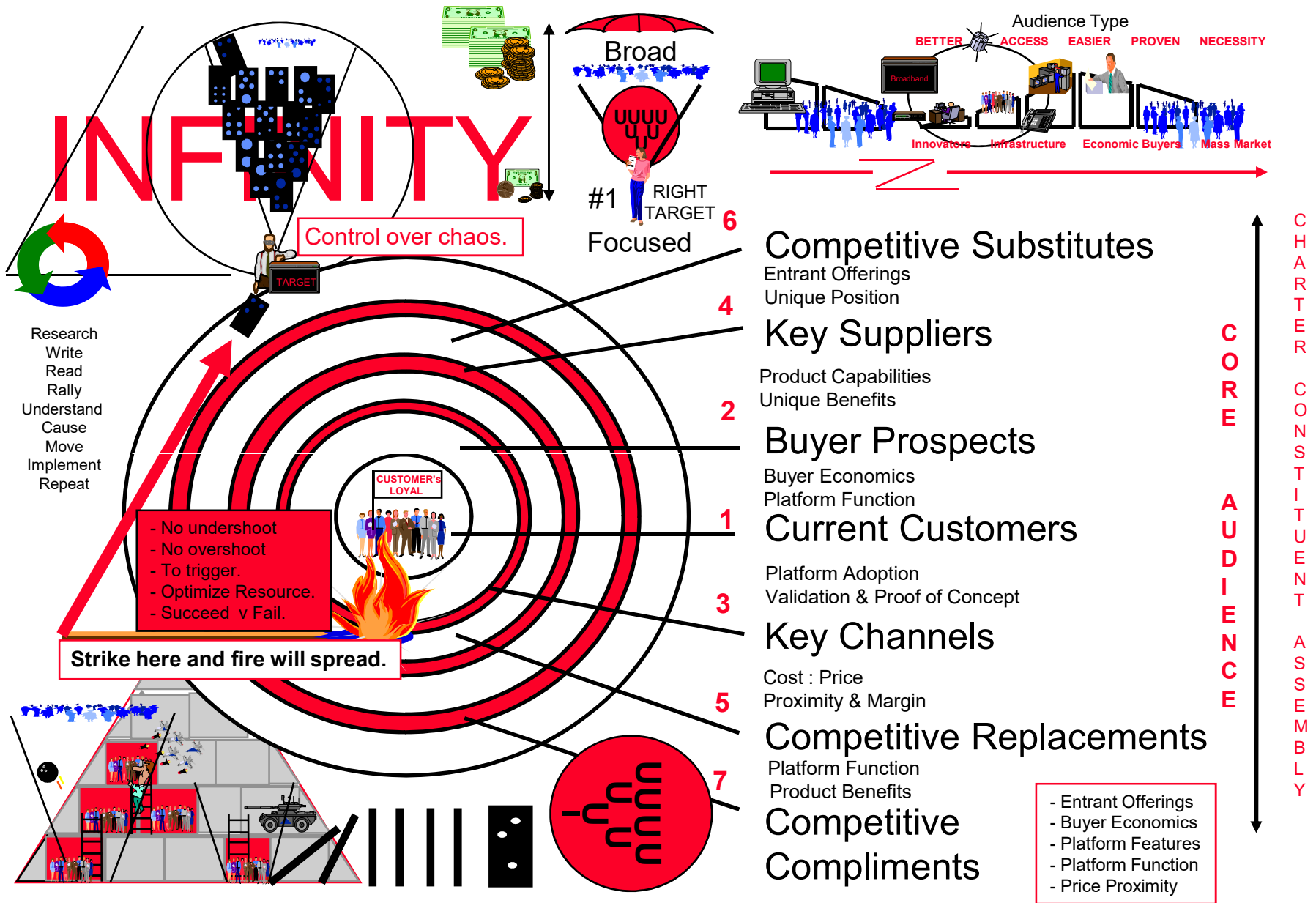
The Art & Science of Camp Marketing

“We can still appeal to the famous subsistence theory, and suppose that in each trade the population will increase by natural increase as long as the returns to the occupation permit it, but that in each trade also, as the numbers increase the returns will tend to diminish, and, when returns have diminished to the point, where the population within the trade no longer grows, equilibrium has been reached. In a society, then, the average income of each trade in equilibrium will be that at which it can just reproduce itself.

. . . if this movement, however, results in the richer group getting still richer as it grows larger, and the poorer group getting still poorer as it grows smaller, obviously the movement is carrying us away from equilibrium”.

An Economists View of the Manpower Concept.
Proceedings of the Conference on the Utilization
of Scientific and Professional Manpower - 1954

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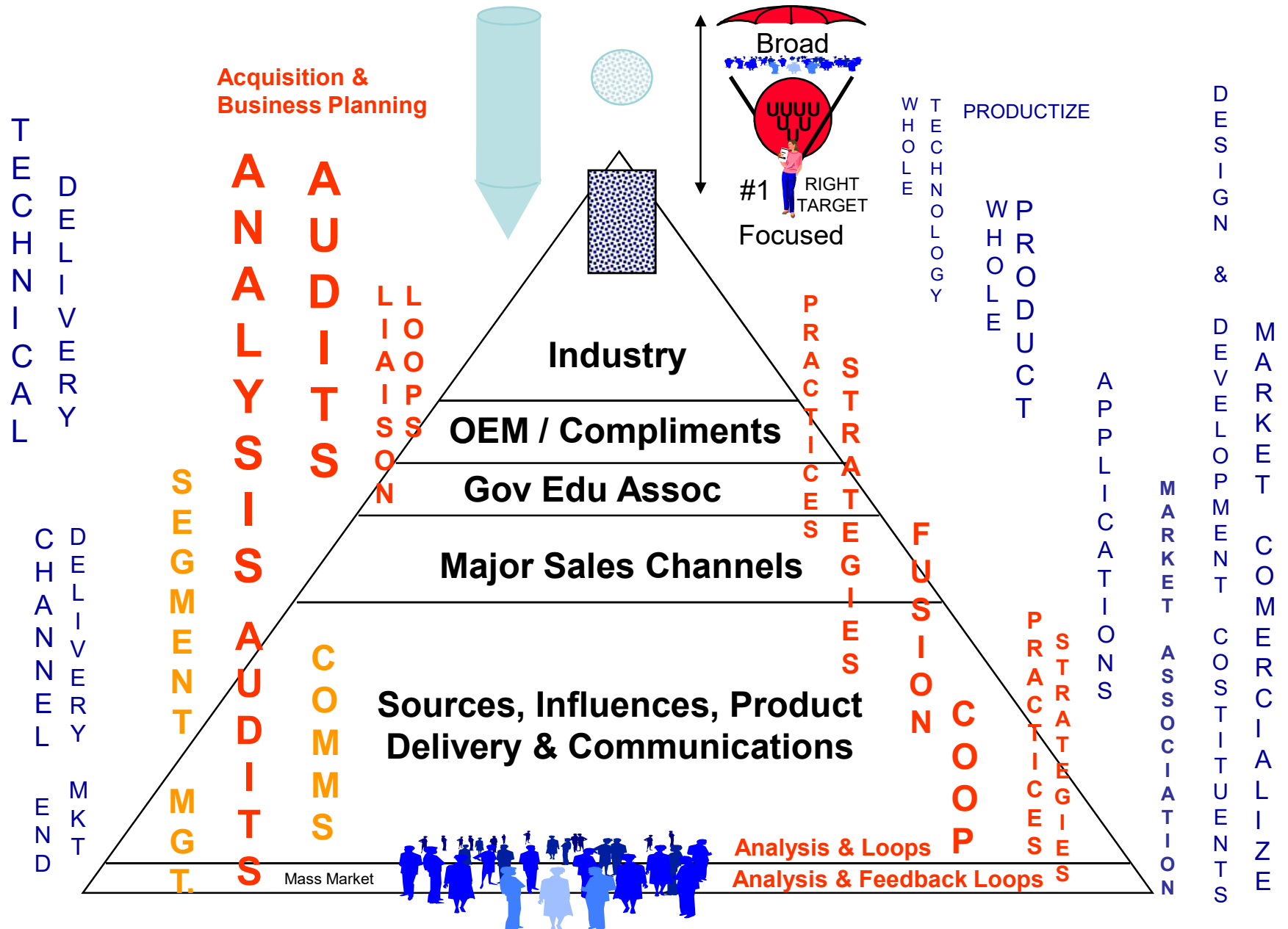


For cost, device productization, product commercialization efficiencies and system sustainability.

Mike Bruzzone, Camp Marketing Consultancy, Campmktng@aol.com, 510/236-8733

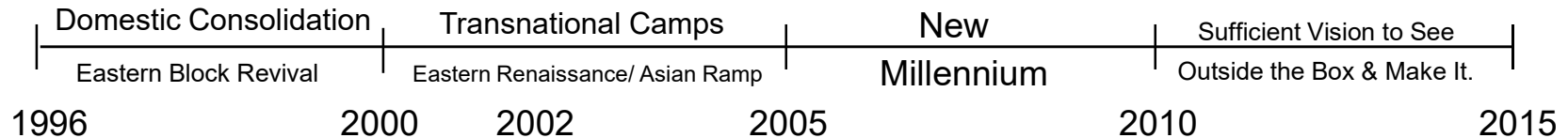
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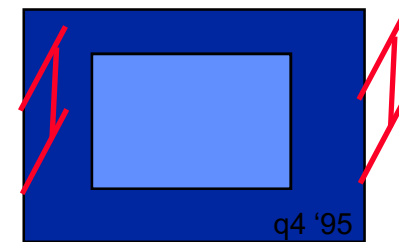


The Art & Science of Camp Marketing

Preparedness is the charter of the day.

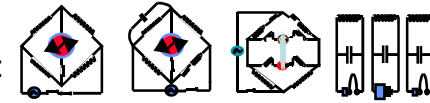


Beyond the box thinking.



Move beyond the box they paint for you.

Camp Marketing Consulting



Project Framework:

Move beyond the box they paint for you.

To give intelligent, responsible, and capable direction for sustainable business within industry for society.

As a prerequisite for planning that serves customers and society as efficiently and effectively as possible.

Understand technology and business possibilities to meet the needs of customers and society as *cost effectively* as possible.

With exemplar stewardship cognizant of social welfare.

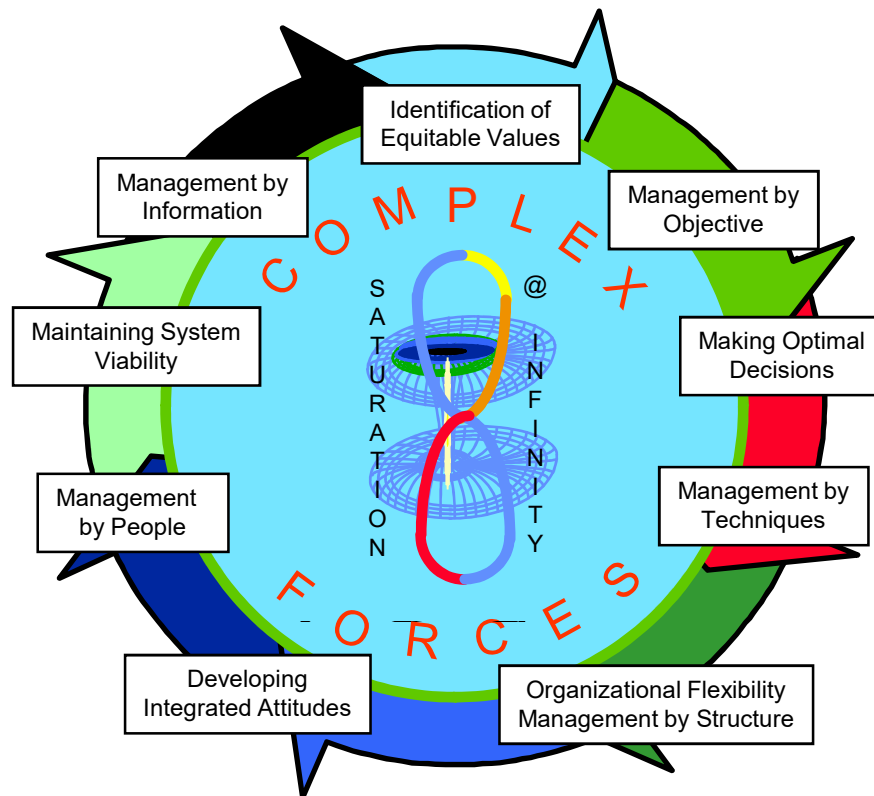
By enlarging the capabilities of the operation; melding together people, process, design, fabrication and utility knowledge for competitive advantage.

To assess equal opportunity for complimentary participation; partnership, cost and reward sharing.

To recognize the obligation to investors; planning for an *adequate* economic return on their investment.

To address economic responsibility as a design and process steward in the countries of industry operation.

To further the well being of the global electronics industry as an advocate of responsible, stable and sustainable growth models that make economic sense.



MIKE BRUZZONE – Camp Marketing Consultancy

Kaizen culture, practitioner of Benkyou, no politics, get the job done. Specializing in operational research, market relations, segment management, product evangelism, planning & tactical implementation, competitor and cluster strategy, product commercialization.