

Camp Marketing Consultancy – Mobile Today on first 25 Weeks Supply Comparison

By Invitation



May 1998

Docket 9288

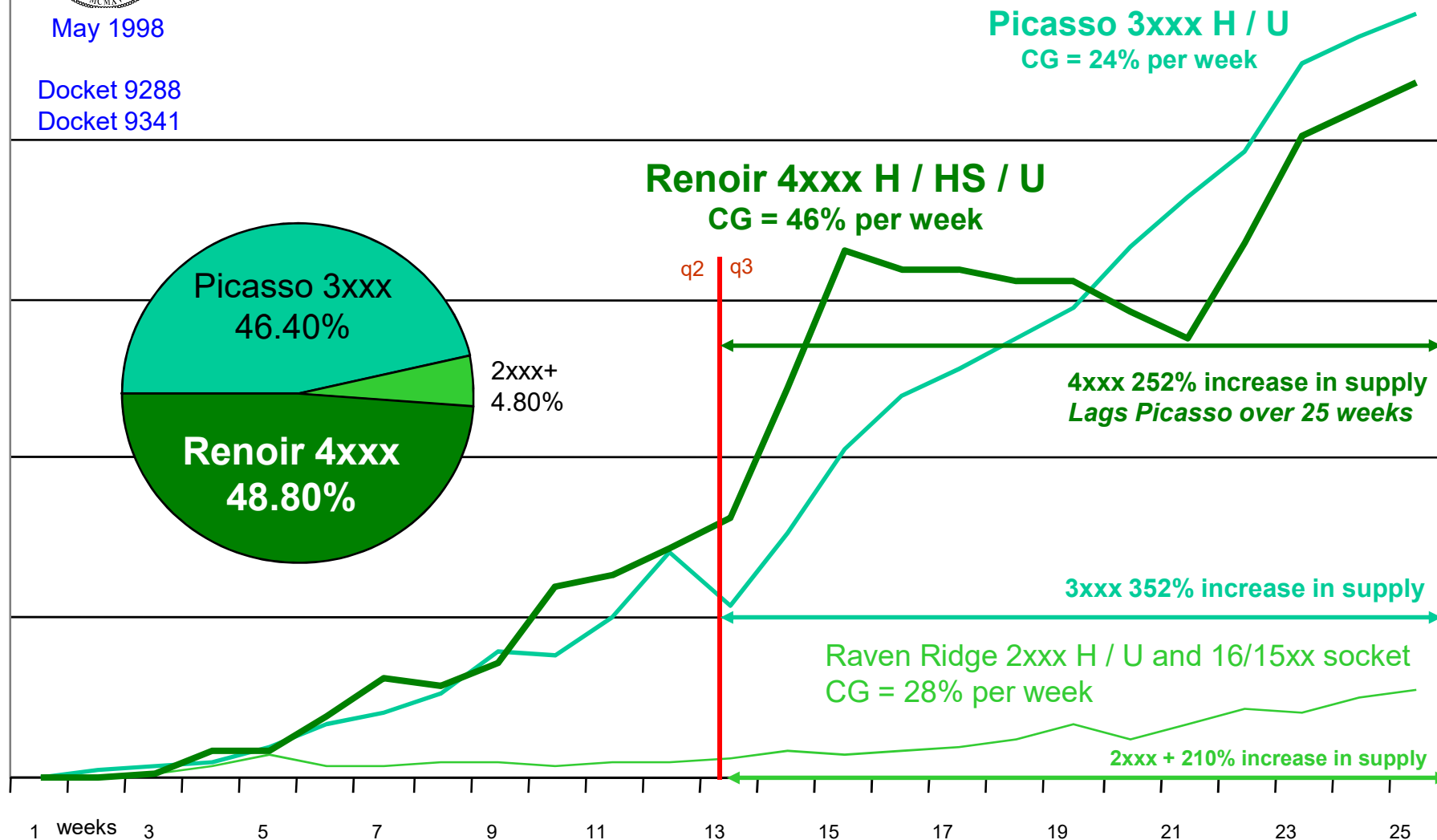
Docket 9341

NOW with 10 nm Ice Lake U Mobile begins slide 34
 Comparing three generations of AMD mobile at 25 weeks of supply
OEM PRICE DATA BEGINS SLIDE 10

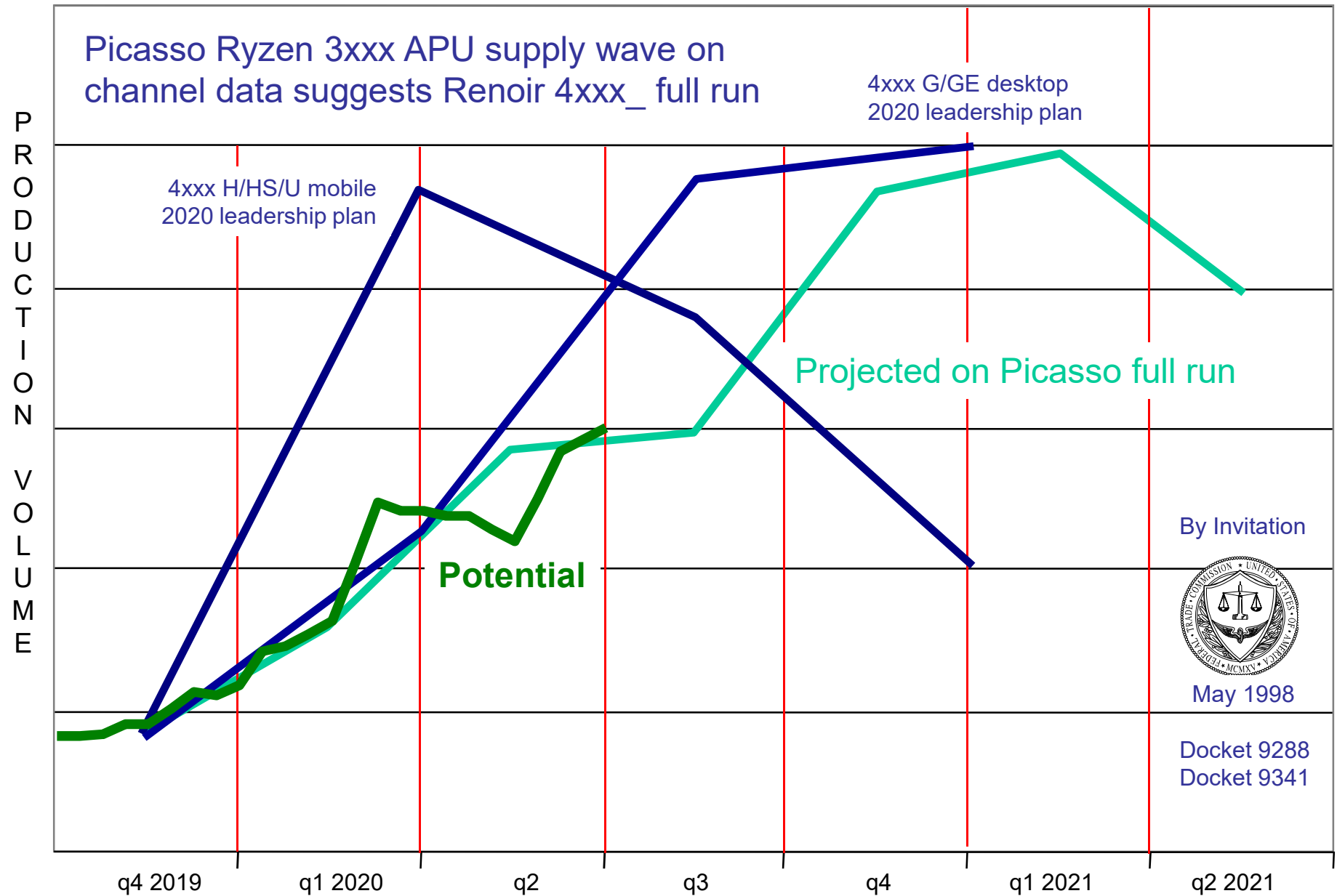
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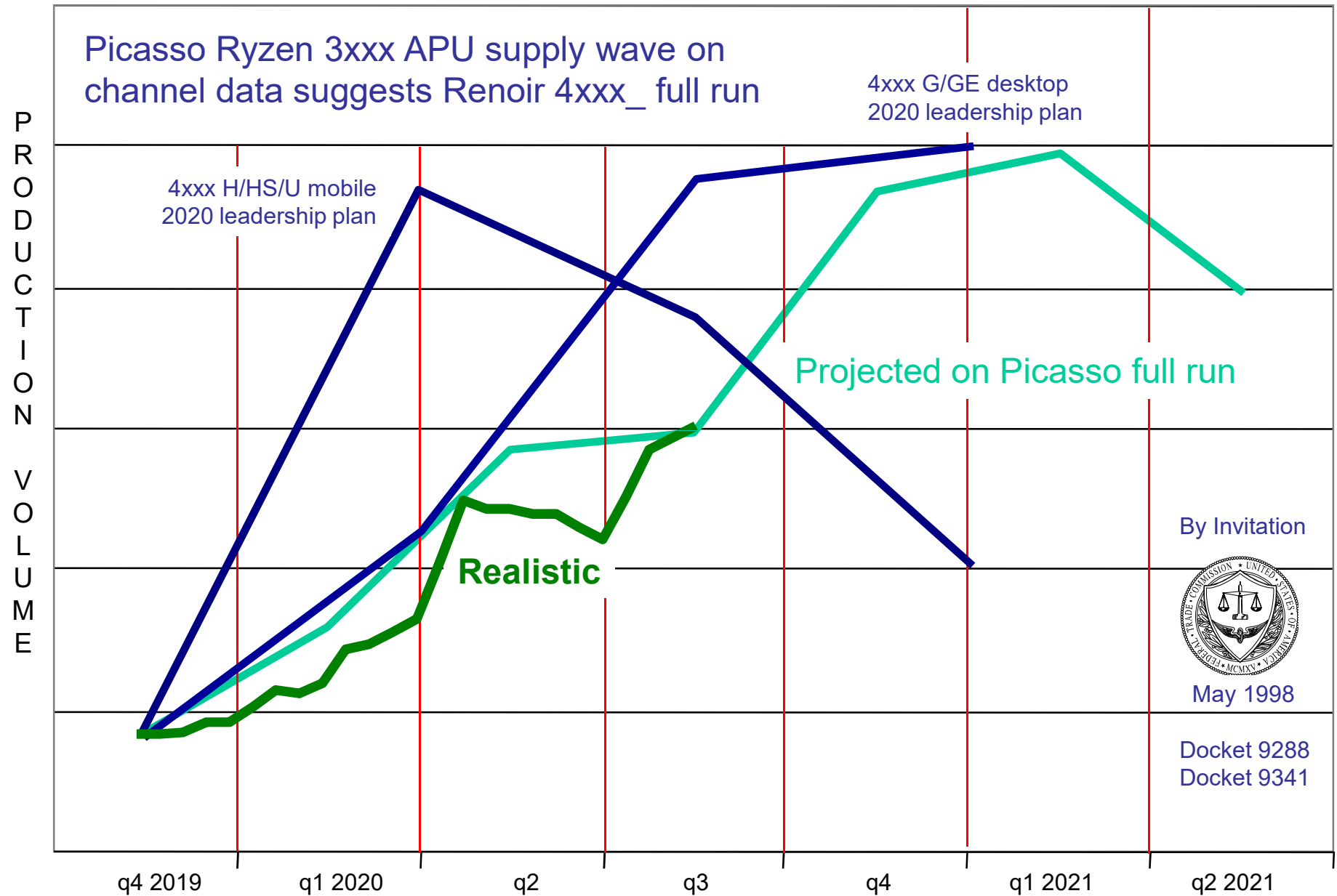
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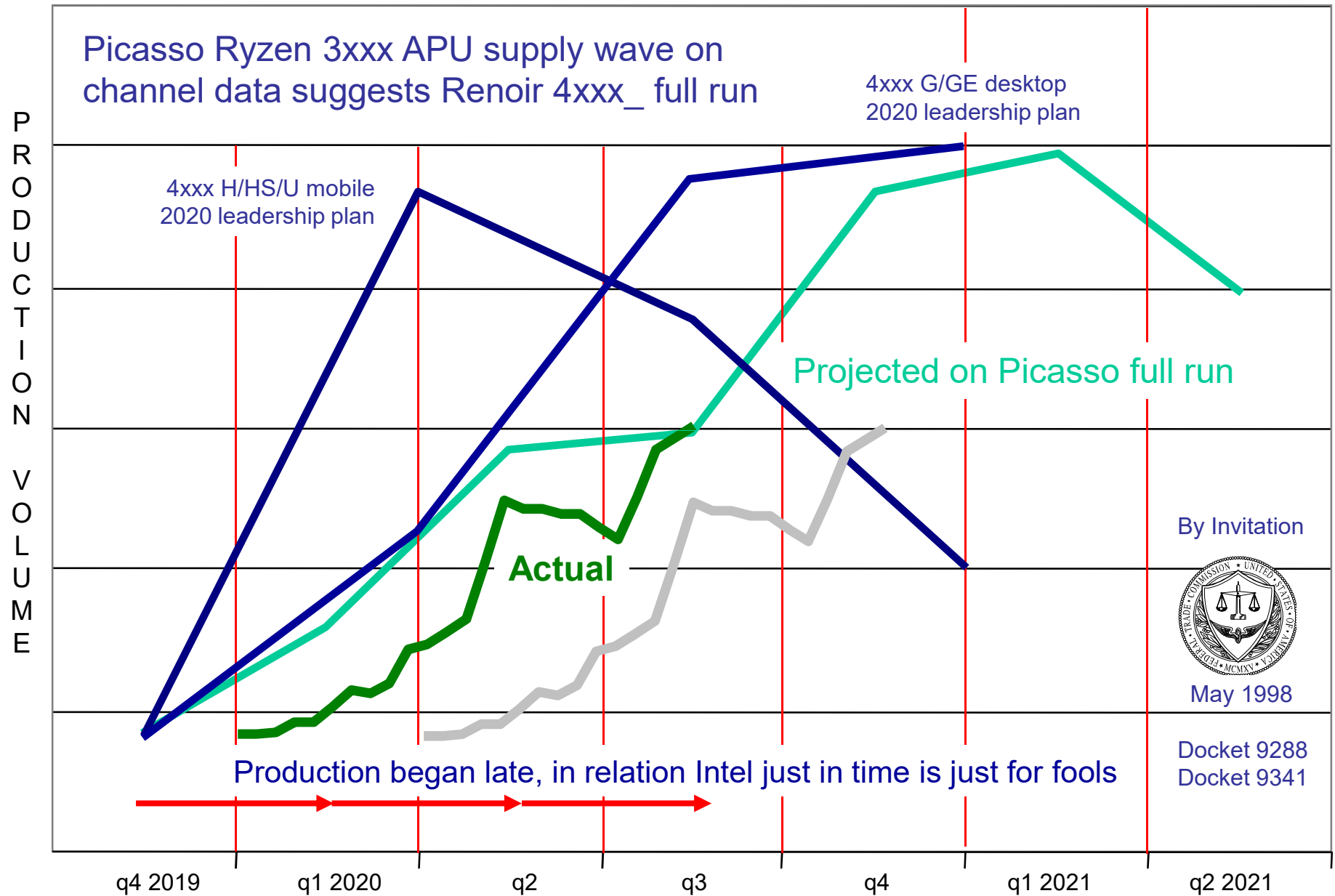
Camp Marketing Consultancy – AMD Leadership Plan x86 into 2020, Profit Maximized



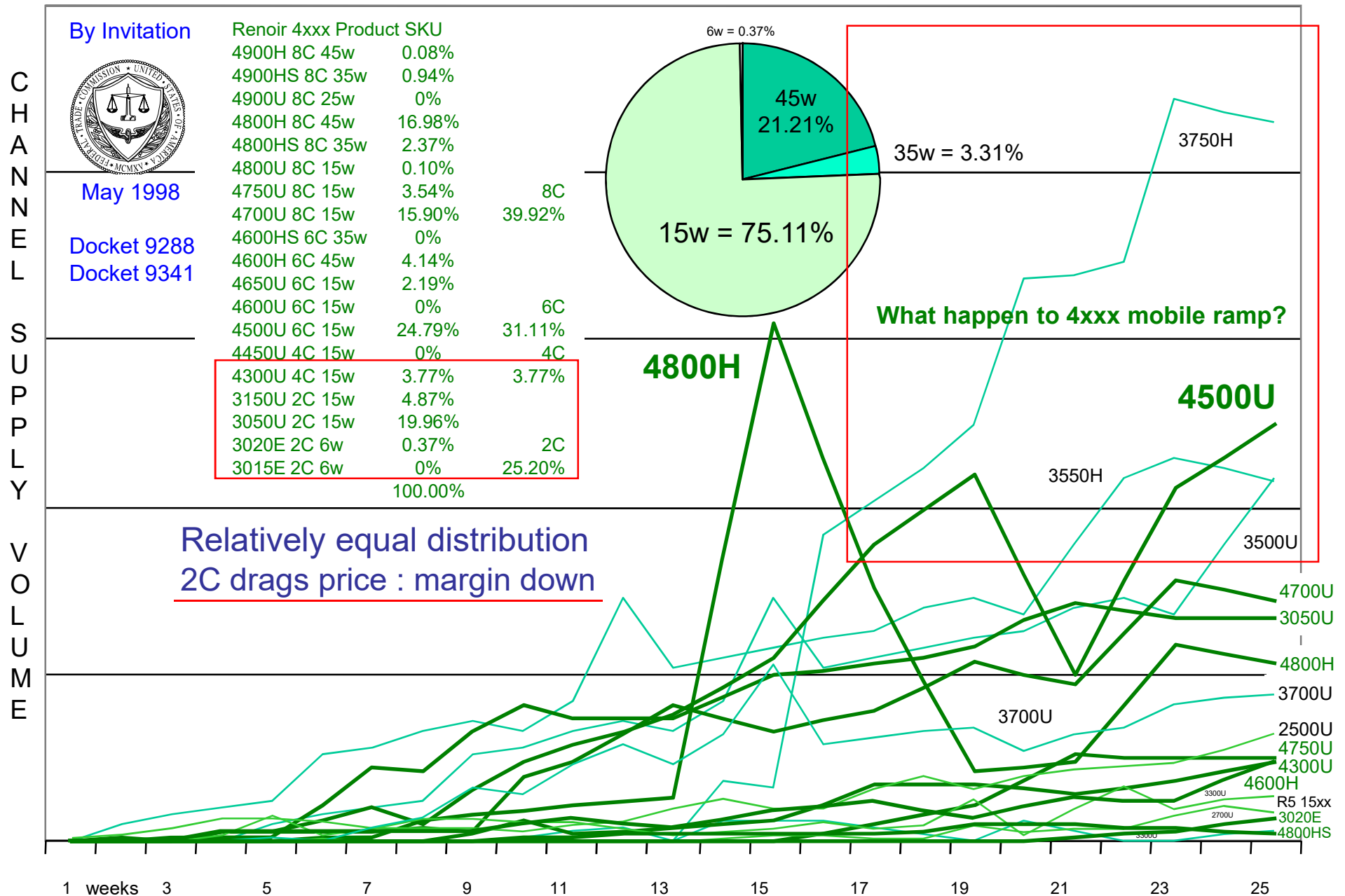
Camp Marketing Consultancy – AMD Leadership Plan x86 into 2020, Profit Maximized



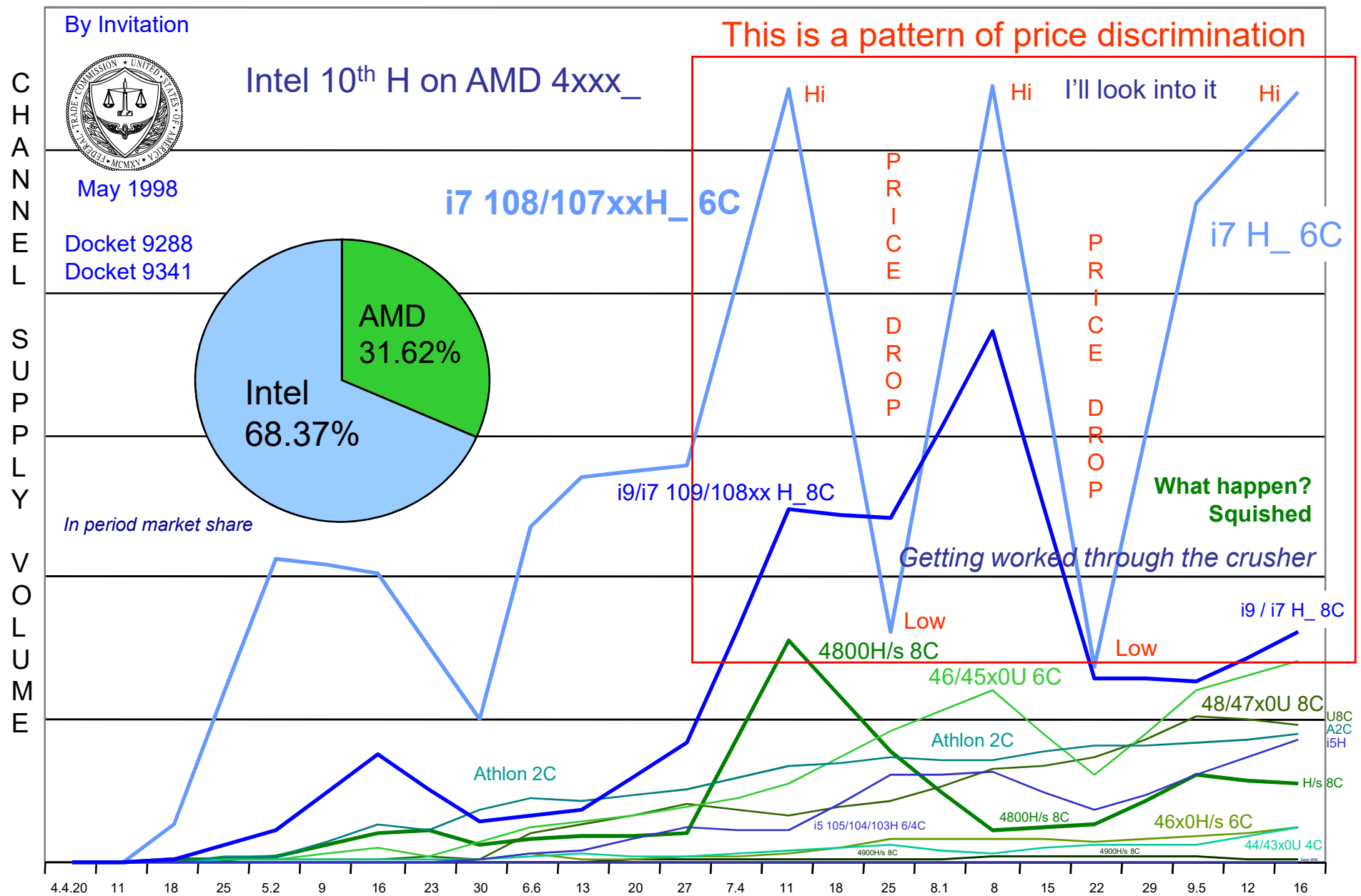
Camp Marketing Consultancy – AMD Leadership Plan x86 into 2020, Profit Maximized



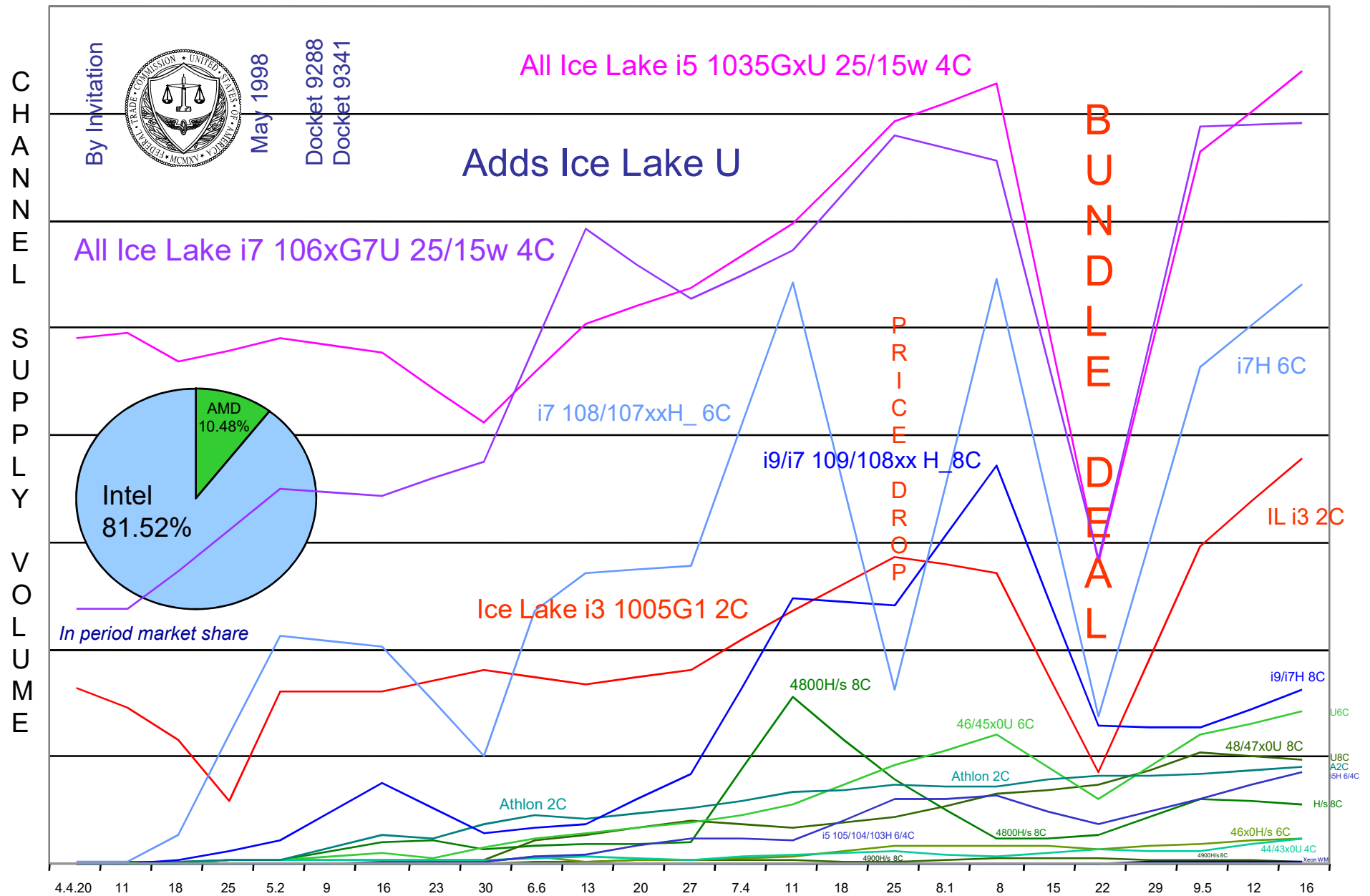
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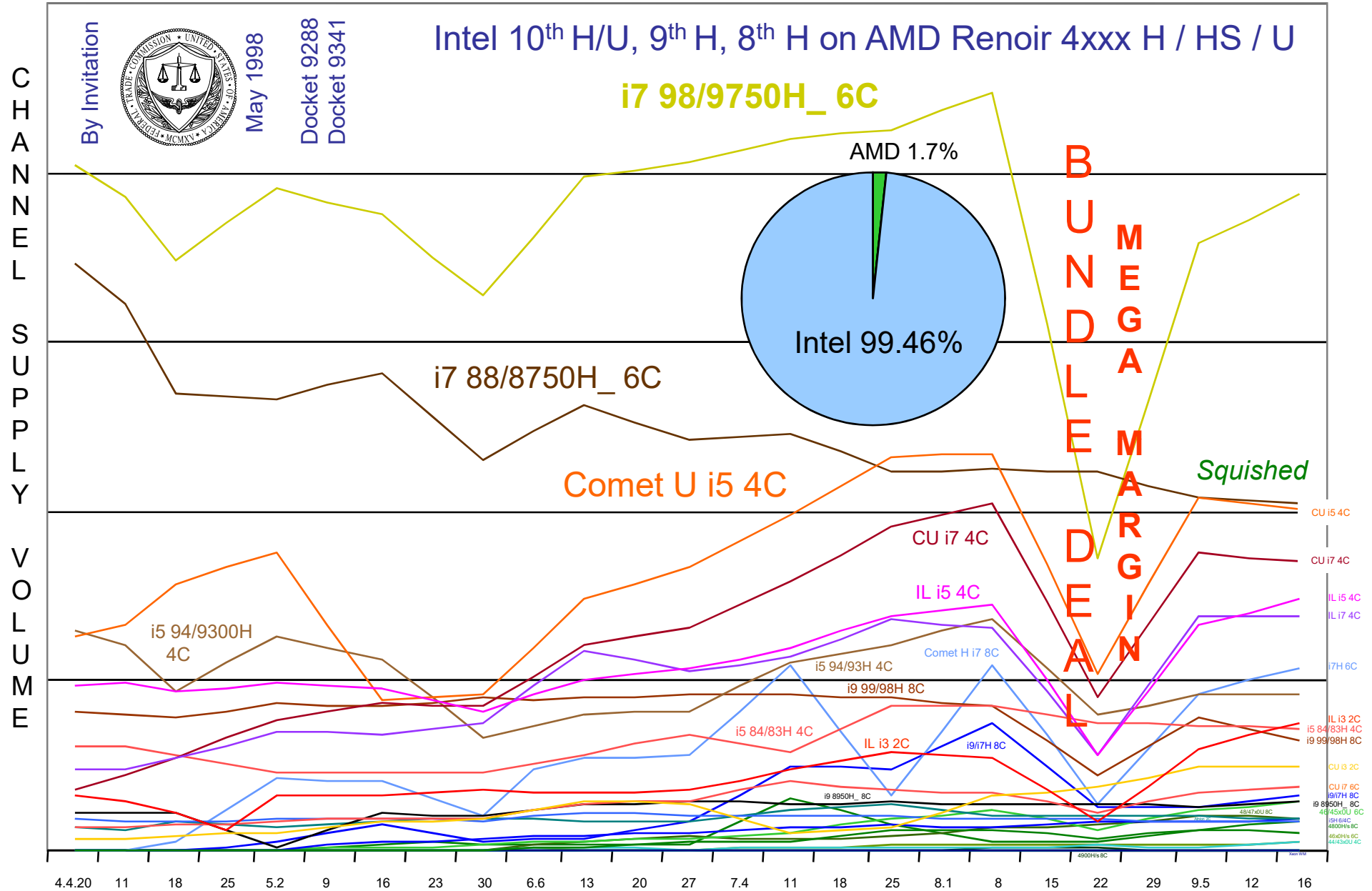
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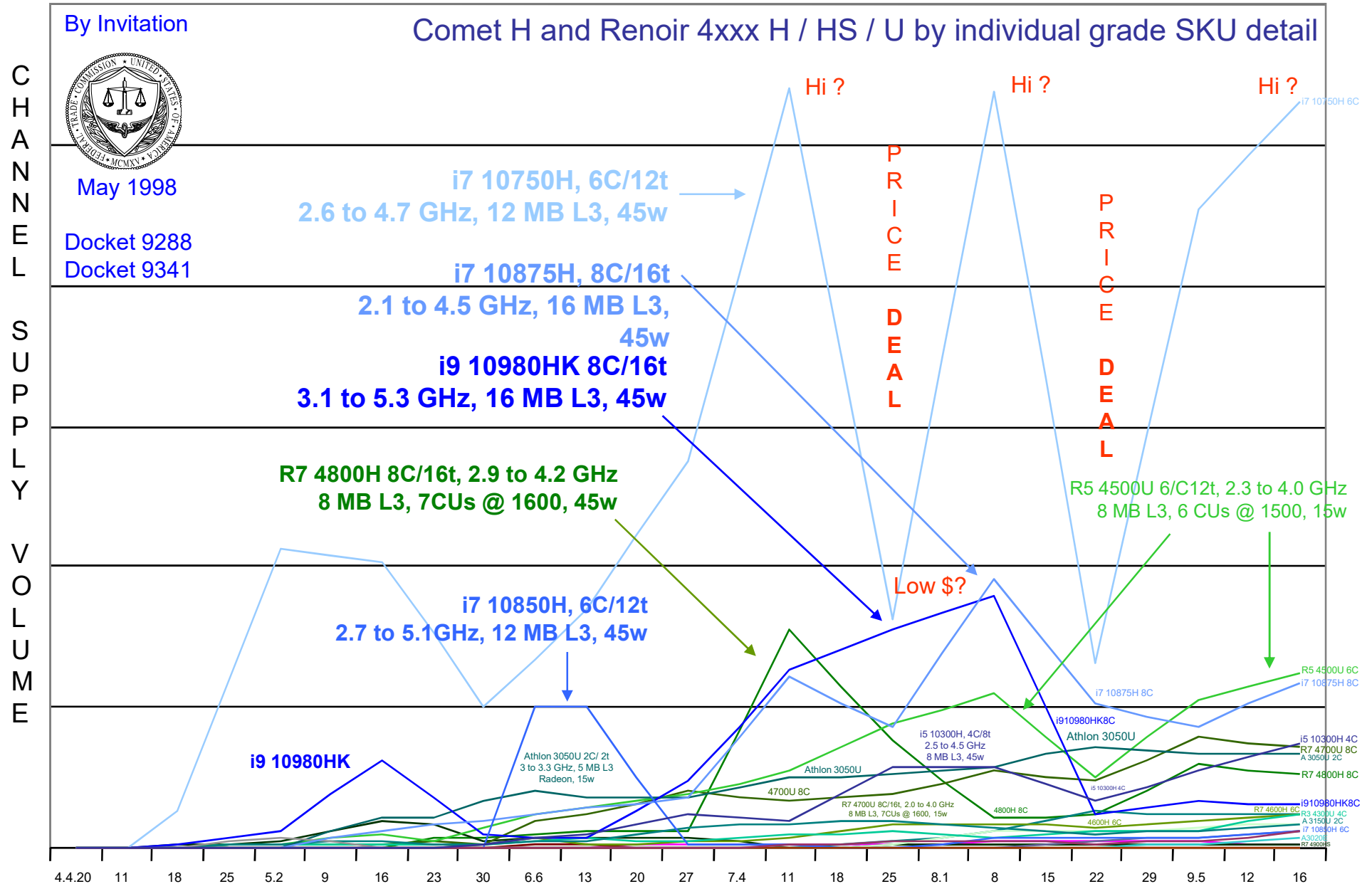
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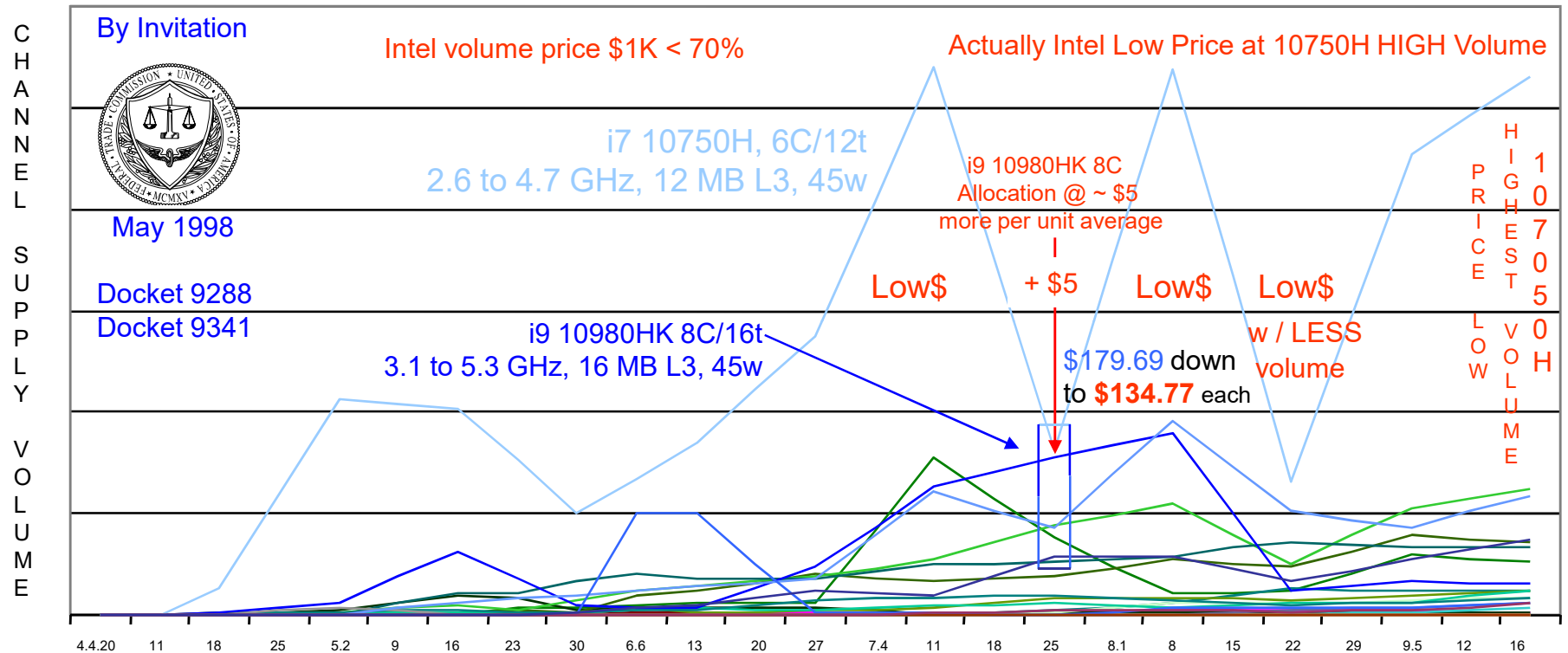


Camp Marketing Consultancy – Mobile Today on first 25 Weeks Supply Comparison

Primarily second degree price discrimination bundle deal of the week. Shows AMD & Intel \$1K AWP
AMD GREEN = OEM @ 1K < 34%. Intel Blue = OEM 1K < 60%. Intel Best = Parity AMD OEM 1K < 70%

AMD by WEEK BUNDLE DEAL PRICE – Intel competes with AMD at Intel Blue and Red Price Line

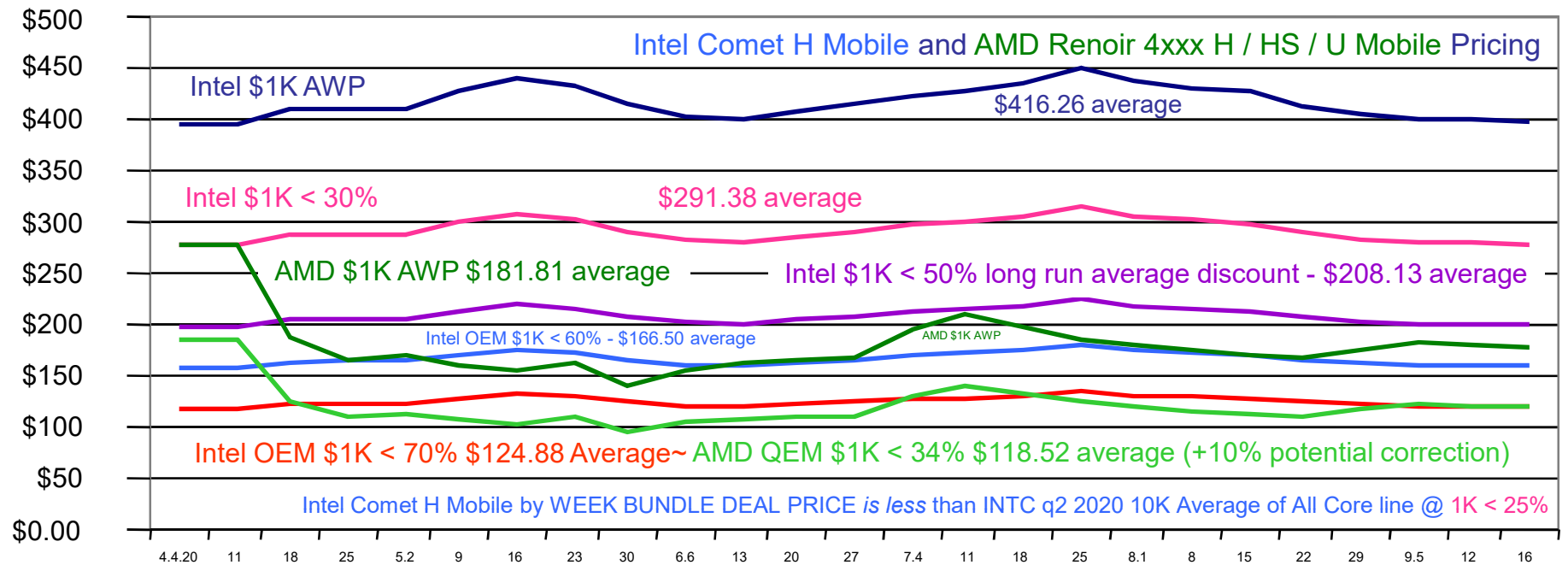
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|-----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|-----------|
| 1K Bundle | \$278.00 | \$278.00 | \$187.67 | \$165.00 | \$170.00 | \$159.54 | \$155.33 | \$163.74 | \$140.81 | \$156.04 | \$162.09 | \$165.20 | \$166.57 | \$195.25 | \$208.76 | \$197.75 | \$186.20 | \$180.23 | \$174.36 | \$169.95 | \$166.28 | \$176.21 | \$183.32 | \$180.72 | \$178.35 |
| OEM < 34% | \$185.33 | \$185.33 | \$125.11 | \$110.00 | \$113.33 | \$106.36 | \$103.56 | \$109.16 | \$93.87 | \$104.03 | \$108.06 | \$110.14 | \$111.05 | \$130.17 | \$139.17 | \$131.83 | \$124.14 | \$120.16 | \$116.24 | \$113.30 | \$110.85 | \$117.47 | \$122.21 | \$120.48 | \$118.908 |



Intel Comet H Mobile by WEEK BUNDLE DEAL PRICE is less than INTC q2 2020 10K Average of All Core line 1K < 25

| | | | | | | | | | | | | | | | | | | | | | | | | | |
|------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| 1K Bundle | \$395.00 | \$395.00 | \$409.37 | \$410.27 | \$411.11 | \$426.80 | \$439.34 | \$431.60 | \$414.96 | \$402.69 | \$400.57 | \$408.36 | \$414.33 | \$423.68 | \$428.51 | \$436.17 | \$449.22 | \$437.09 | \$430.96 | \$426.70 | \$412.68 | \$404.79 | \$400.53 | \$399.00 | \$397.97 |
| 30% off 1K | \$276.50 | \$276.50 | \$286.56 | \$287.19 | \$287.78 | \$298.76 | \$307.54 | \$302.12 | \$290.47 | \$281.88 | \$280.40 | \$285.85 | \$290.03 | \$296.58 | \$299.96 | \$305.32 | \$314.45 | \$305.96 | \$301.67 | \$298.69 | \$288.88 | \$283.35 | \$280.37 | \$279.30 | \$278.58 |
| 50% off 1K | \$197.50 | \$197.50 | \$204.68 | \$205.13 | \$205.56 | \$213.40 | \$219.67 | \$215.80 | \$207.48 | \$201.35 | \$200.29 | \$204.18 | \$207.16 | \$211.84 | \$214.25 | \$218.09 | \$224.61 | \$218.54 | \$215.48 | \$213.35 | \$206.34 | \$202.39 | \$200.26 | \$199.50 | \$198.98 |
| 60% off 1K | \$158.00 | \$158.00 | \$163.75 | \$164.11 | \$164.45 | \$170.72 | \$175.73 | \$172.64 | \$165.98 | \$161.08 | \$160.23 | \$163.35 | \$165.73 | \$169.47 | \$171.40 | \$174.47 | \$179.69 | \$174.83 | \$172.38 | \$170.68 | \$165.07 | \$161.91 | \$160.21 | \$159.60 | \$159.19 |
| 70% off 1K | \$118.50 | \$118.50 | \$122.81 | \$123.08 | \$123.33 | \$128.04 | \$131.80 | \$129.48 | \$124.49 | \$120.81 | \$120.17 | \$122.51 | \$124.30 | \$127.10 | \$128.55 | \$130.85 | \$134.77 | \$131.13 | \$129.29 | \$128.01 | \$123.80 | \$121.44 | \$120.16 | \$119.70 | \$119.39 |

Camp Marketing Consultancy – Mobile Today on first 25 Weeks Supply Comparison



| Category Grade SKU | % in Period | AMD | Intel |
|---------------------|-------------|-----|-------|
| R7 4900H 8C 45w | 0.03% | | |
| R7 4900HS 8C 35w | 0.30% | | |
| R7 4900U 8C 25w | 0.00% | | |
| R7 4800H 8C 45w | 5.37% | | |
| R7 4800 HS 8C 35w | 0.75% | | |
| R7 4800U 8C 15w | 0.03% | | |
| R7 4750U 8C 15w | 1.12% | | |
| R7 4700U 8C 15w | 5.03% | | |
| R7 4600H 6C 45w | 1.31% | | |
| R7 4600HS 6C 35w | 0.00% | | |
| R5 4650U 6C 15w | 0.69% | | |
| R5 4600U 6C 15w | 0.00% | | |
| R5 4599U 6C 15w | 7.84% | | |
| R3 4450U 4C 15w | 0.00% | | |
| R3 4300U 4C 15w | 1.19% | | |
| Athlon 3150U 2C 15w | 1.54% | | |
| Athlon 3050U 2C 15w | 6.31% | | |
| Athlon 3020E 2C 6w | 0.12% | | |
| Athlon 3015E 2C 6w | 0.00% | | |
| Xeon W 10885M 8C | 0.03% | | |
| Xeon W 10855M 8C | 0.00% | | |
| i9 10980HK 8C | 8.96% | | |
| i9 10885H 8C | 0.28% | | |
| i9 10880H 8C | 0.14% | | |
| i7 10875H 8C | 10.17% | | |
| i7 10850H 6C | 2.09% | | |
| i7 10750H 6C | 42.23% | | |
| i5 10550H 6C | 0.00% | | |
| i5 10500H 6C | 0.00% | | |
| i5 10400H 6C | 0.36% | | |
| i5 10300H 4C | 4.13% | | |
| | 100.00% | | |

Analysis-

Intel wants to price at 1K < 50%
 However AMD under prices 4xxx H / HS / U
 As a result Intel punishes AMD to raise price
 Intel price strategy targets AMD \$1K AWP
 After which Intel discounts competitively
 AMD price low? Yes, but on grade weight 1/3 is 2 core
 Analyst 4xxx mobile price estimate < 6 to 10% 4xxxG*
 4xxxG known price range \$149 to \$309
 Comet H MC1K < 50% = \$83 for Intel price floor ~ \$167
 Comet H fabrication cost = \$23 & production \$34 to \$41

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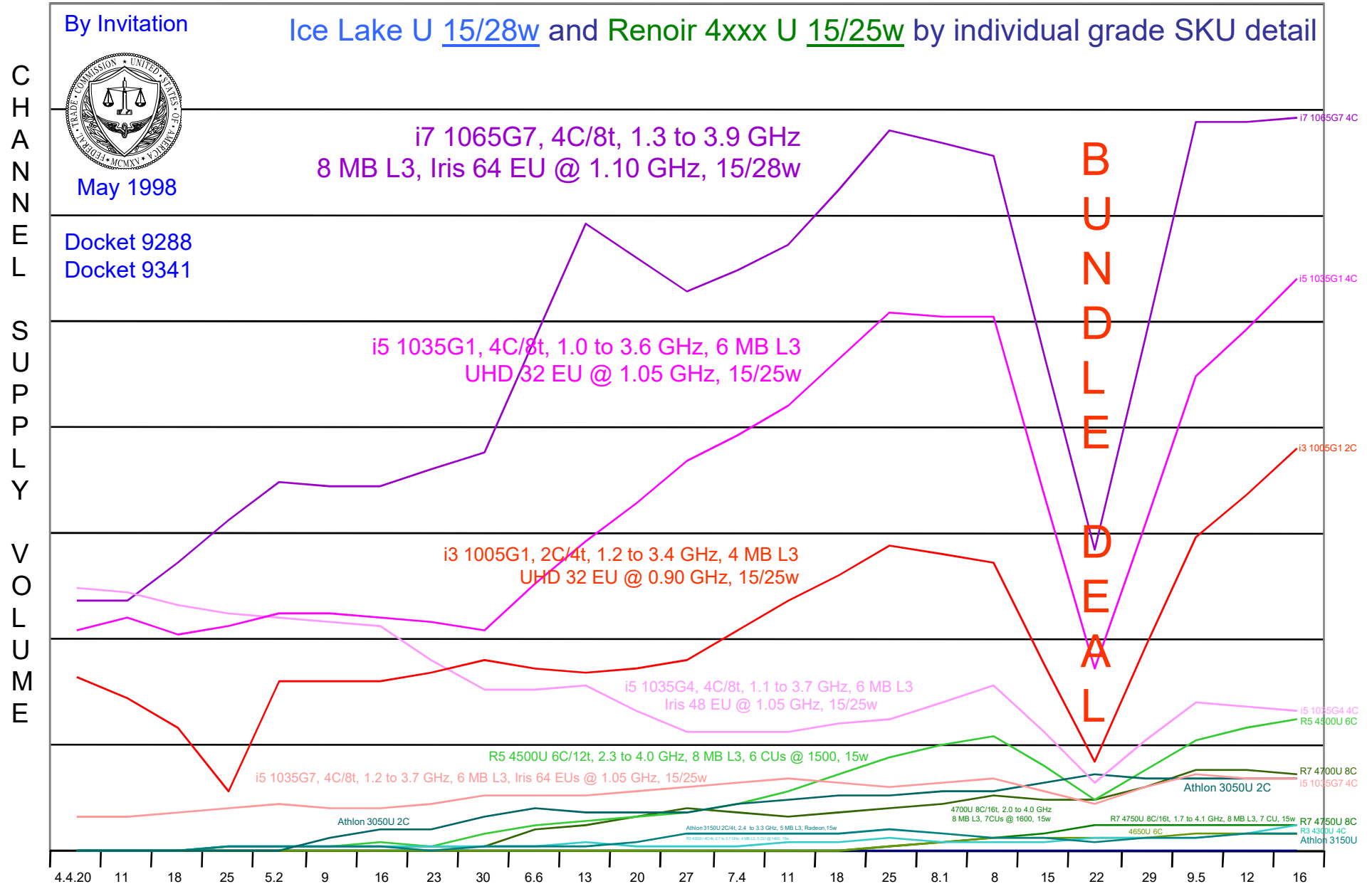


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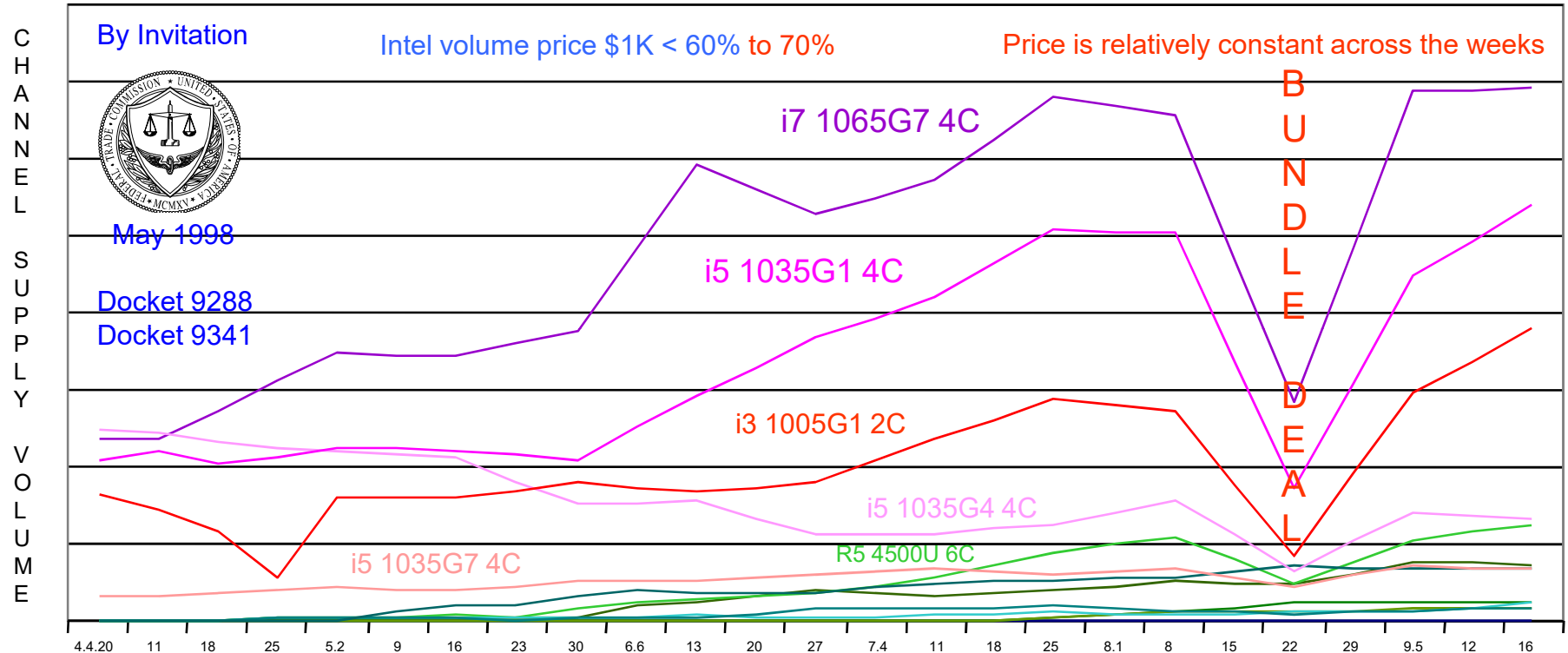


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AMD by WEEK BUNDLE DEAL PRICE – Intel competes with AMD at Intel Blue and Red Price Line

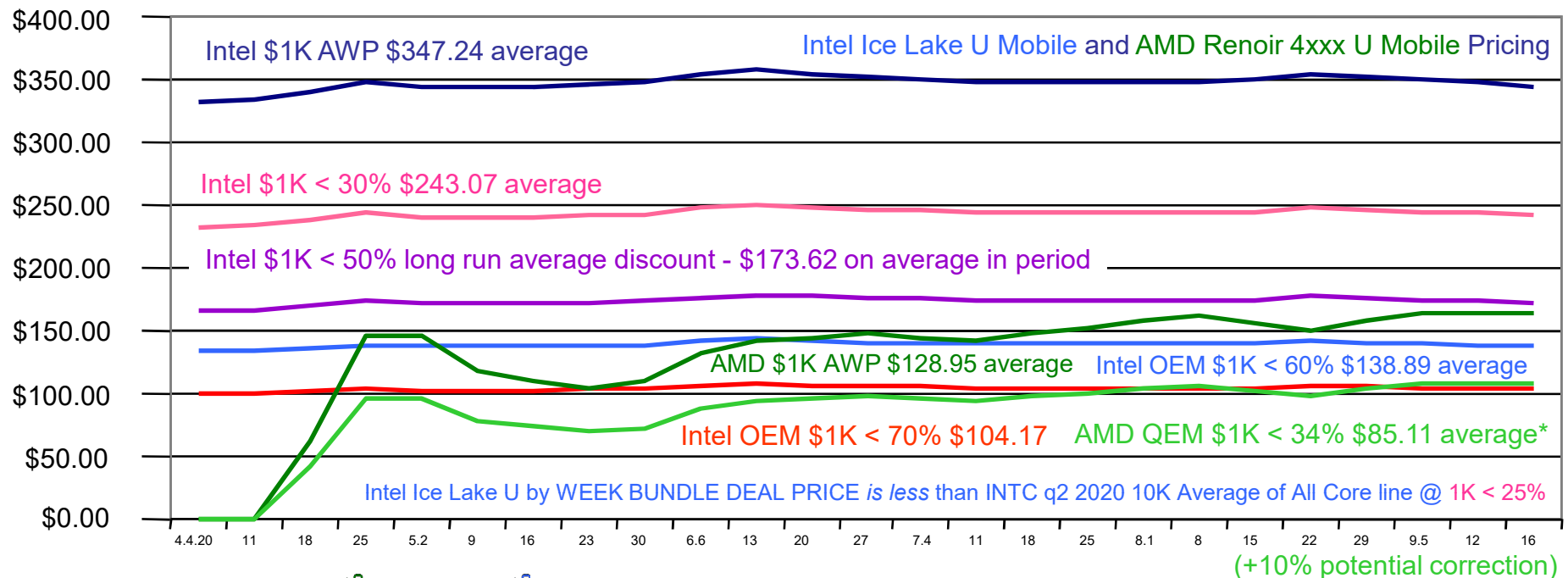
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|-----------|--------|--------|---------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| 1K Bundle | \$0.00 | \$0.00 | \$63.00 | \$145.38 | \$145.38 | \$118.30 | \$110.65 | \$104.71 | \$110.00 | \$132.57 | \$141.15 | \$144.41 | \$147.60 | \$144.57 | \$141.79 | \$147.96 | \$152.28 | \$157.62 | \$161.92 | \$155.47 | \$149.66 | \$158.19 | \$164.32 | \$163.74 | \$163.31 |
| OEM < 34% | \$0.00 | \$0.00 | \$41.58 | \$95.95 | \$95.95 | \$78.08 | \$73.03 | \$69.11 | \$72.60 | \$87.50 | \$93.16 | \$95.31 | \$97.42 | \$95.42 | \$93.58 | \$97.65 | \$100.51 | \$104.03 | \$106.87 | \$102.61 | \$98.78 | \$104.40 | \$108.45 | \$108.07 | \$107.79 |



Intel Ice Lake U Mobile by WEEK BUNDLE DEAL PRICE is less than INTC q2 2020 10K Average of All Core line 1K < 25%

| | | | | | | | | | | | | | | | | | | | | | | | | | |
|------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| 1K Bundle | \$332.68 | \$333.35 | \$340.02 | \$347.47 | \$343.13 | \$343.16 | \$343.14 | \$345.18 | \$347.07 | \$353.11 | \$357.81 | \$354.64 | \$351.44 | \$350.05 | \$348.85 | \$348.86 | \$348.82 | \$348.24 | \$347.58 | \$349.46 | \$354.04 | \$351.12 | \$349.97 | \$347.23 | \$344.70 |
| 30% off 1K | \$232.87 | \$233.35 | \$238.01 | \$243.23 | \$240.19 | \$240.21 | \$240.20 | \$241.63 | \$242.95 | \$247.18 | \$250.46 | \$248.25 | \$246.01 | \$245.04 | \$244.19 | \$244.20 | \$244.17 | \$243.77 | \$243.31 | \$244.62 | \$247.83 | \$245.79 | \$244.98 | \$243.06 | \$241.29 |
| 50% off 1K | \$166.34 | \$166.68 | \$170.01 | \$173.74 | \$171.57 | \$171.58 | \$171.57 | \$172.59 | \$173.53 | \$176.56 | \$178.90 | \$177.32 | \$175.72 | \$175.03 | \$174.42 | \$174.43 | \$174.41 | \$174.12 | \$173.79 | \$174.73 | \$177.02 | \$175.56 | \$174.99 | \$173.62 | \$172.35 |
| 60% off 1K | \$133.07 | \$133.34 | \$136.01 | \$138.99 | \$137.25 | \$137.27 | \$137.26 | \$138.07 | \$138.83 | \$141.25 | \$143.12 | \$141.86 | \$140.58 | \$140.02 | \$139.54 | \$139.55 | \$139.53 | \$139.29 | \$139.03 | \$139.78 | \$141.62 | \$140.45 | \$139.99 | \$138.89 | \$137.88 |
| 70% off 1K | \$99.80 | \$100.01 | \$102.01 | \$104.24 | \$102.94 | \$102.95 | \$102.94 | \$103.55 | \$104.12 | \$105.93 | \$107.34 | \$106.39 | \$105.43 | \$105.02 | \$104.65 | \$104.66 | \$104.65 | \$104.47 | \$104.27 | \$104.84 | \$106.21 | \$105.34 | \$104.99 | \$104.17 | \$103.41 |

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| Category Grade SKU | % in Period |
|---------------------|-------------|
| R7 4900U 8C 25w | 0.00% |
| R7 4800U 8C 15w | 0.01% |
| R7 4750U 8C 15w | 0.50% |
| R7 4700U 8C 15w | 2.23% |
| R5 4650U 6C 15w | 0.31% |
| R5 4600U 6C 15w | 0.00% |
| R5 4599U 6C 15w | 3.48% |
| R3 4450U 4C 15w | 0.00% |
| R3 4300U 4C 15w | 0.53% |
| Athlon 3150U 2C 15w | 0.68% |
| Athlon 3050U 2C 15w | 2.80% |
| i7 1068G7 4C 28w | 0.00% |
| i7 1065G7 4C 15/28w | 35.20% |
| i5 1035G7 4C 15/25w | 3.90% |
| i5 1035G4 4C 15/25w | 11.53% |
| i5 1035G1 4C 15/25w | 24.17% |
| i3 1005G1 2C 15/25w | 14.66% |
| | 100.00% |

Analysis –

AMD under prices Renoir 4xxx mobile; gives away.
 Renoir finished goods thought to be margin starved.
 1) OEM price power 2) known Intel bundle deal margin advantage.
 If AMD raises price, Intel will too.
 Analyst rejects low x86 price floor to combat ARM entry
 Cost of Intel 10 nm is 24% greater than Intel 14 nm

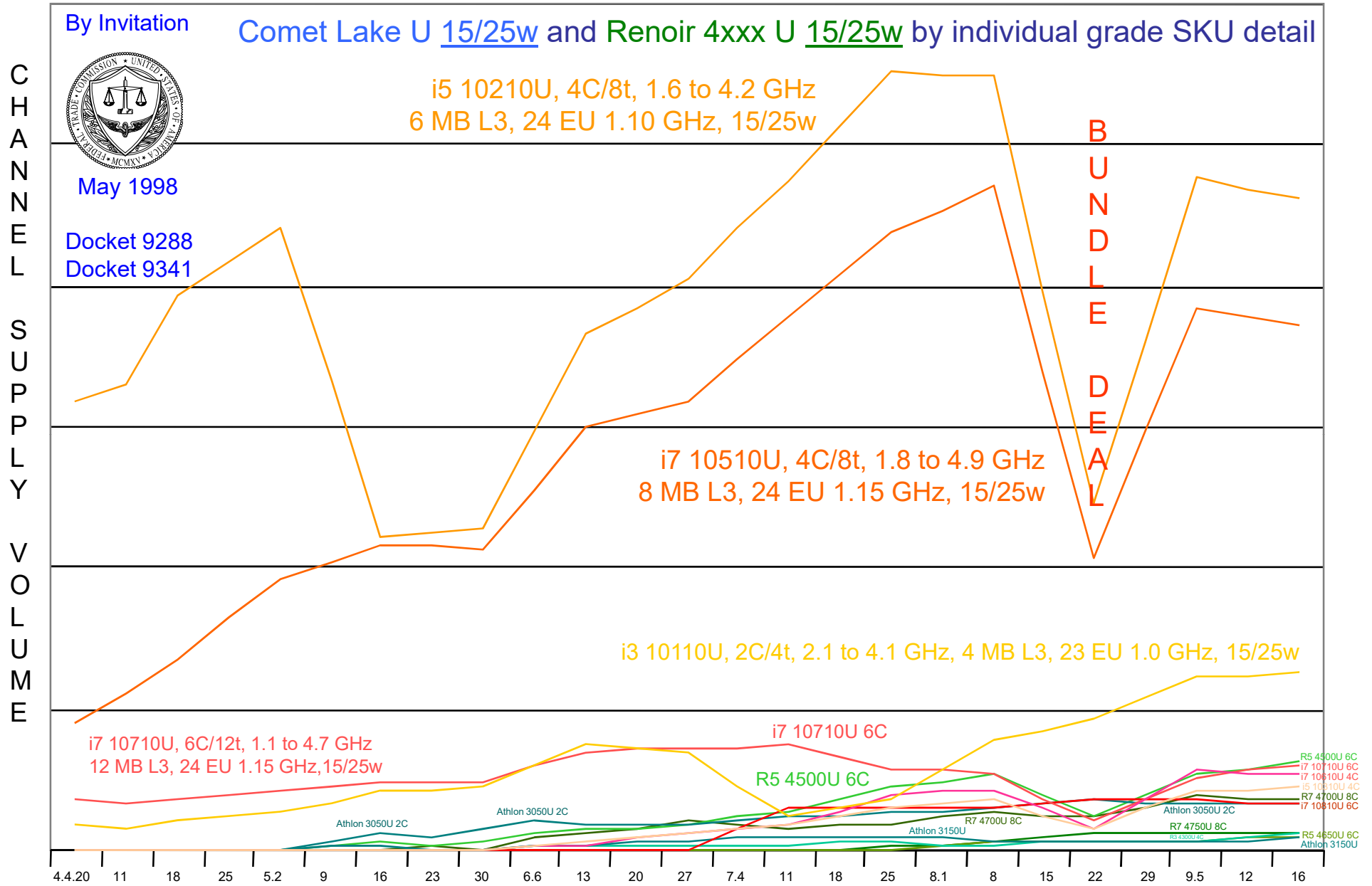
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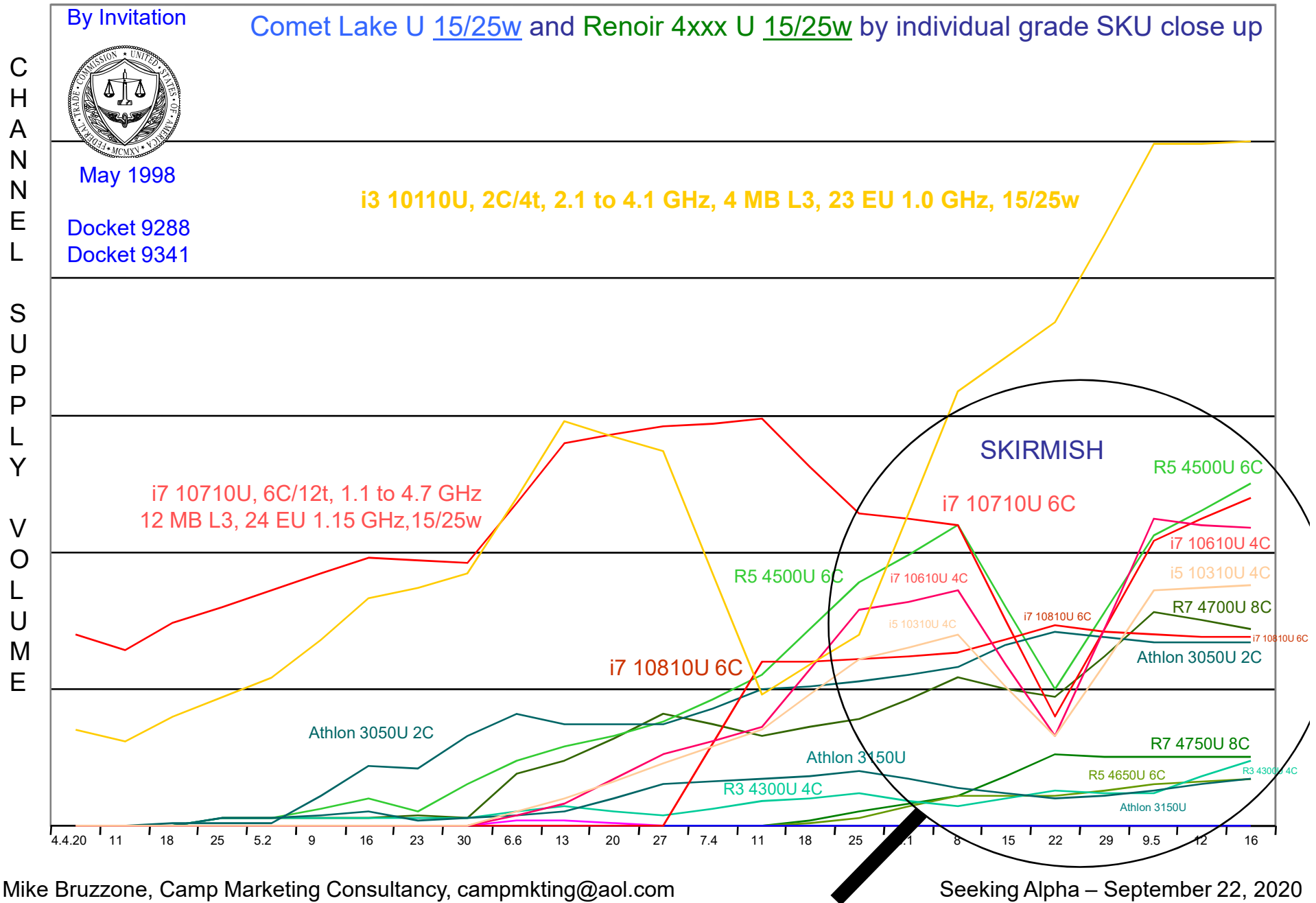
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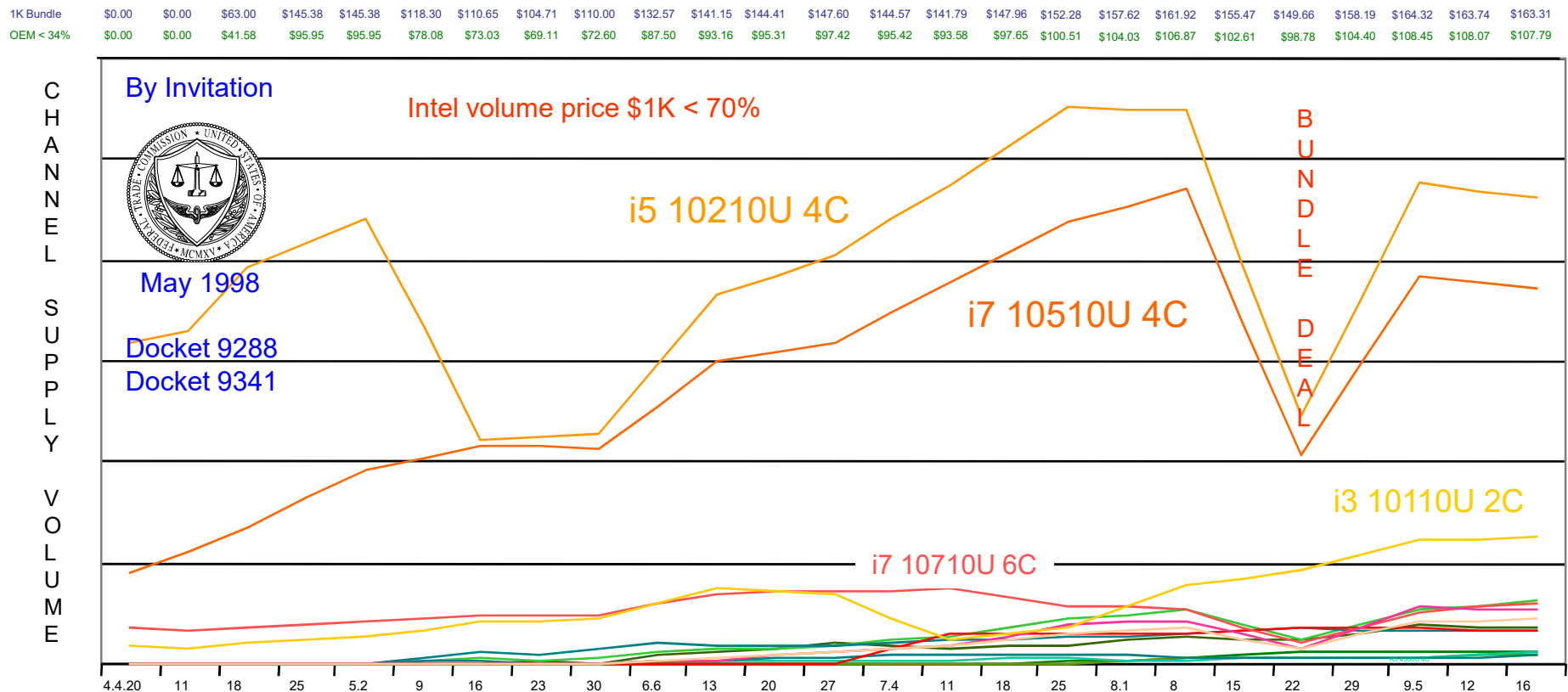
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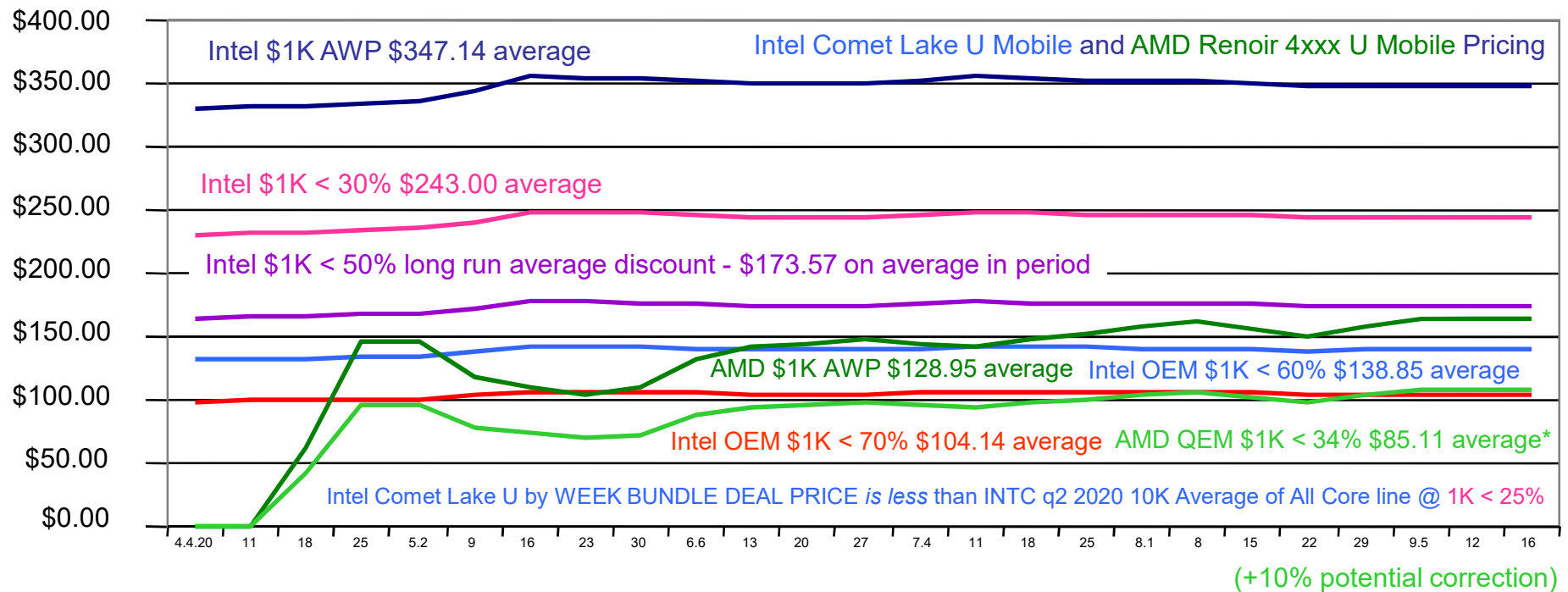
AMD by WEEK BUNDLE DEAL PRICE – Intel competes with AMD at Intel Blue and Red Price Line



Intel Comet Lake U Mobile by WEEK BUNDLE DEAL PRICE is less than INTC q2 2020 10K Average of All Core line 1K < 25%

| | | | | | | | | | | | | | | | | | | | | | | | | | |
|------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| 1K Bundle | \$329.31 | \$331.62 | \$331.70 | \$334.07 | \$336.05 | \$344.27 | \$355.18 | \$354.29 | \$353.35 | \$351.12 | \$349.69 | \$349.58 | \$349.44 | \$352.49 | \$355.20 | \$353.74 | \$352.59 | \$352.09 | \$351.59 | \$350.23 | \$347.41 | \$347.97 | \$348.29 | \$348.52 | \$348.81 |
| 30% off 1K | \$230.52 | \$232.14 | \$232.19 | \$233.85 | \$235.23 | \$240.99 | \$248.62 | \$248.01 | \$247.34 | \$245.78 | \$244.78 | \$244.70 | \$244.61 | \$246.75 | \$248.64 | \$247.62 | \$246.81 | \$246.46 | \$246.11 | \$245.16 | \$243.19 | \$243.58 | \$243.80 | \$243.96 | \$244.17 |
| 50% off 1K | \$164.66 | \$165.81 | \$165.85 | \$167.04 | \$168.02 | \$172.14 | \$177.59 | \$177.15 | \$176.67 | \$175.56 | \$174.85 | \$174.79 | \$174.72 | \$176.25 | \$177.60 | \$176.87 | \$176.29 | \$176.04 | \$175.80 | \$175.11 | \$173.71 | \$173.99 | \$174.15 | \$174.26 | \$174.41 |
| 60% off 1K | \$131.73 | \$132.65 | \$132.68 | \$133.63 | \$134.42 | \$137.71 | \$142.07 | \$141.72 | \$141.34 | \$140.45 | \$139.88 | \$139.83 | \$139.77 | \$141.00 | \$142.08 | \$141.50 | \$141.03 | \$140.83 | \$140.64 | \$140.09 | \$138.97 | \$139.19 | \$139.32 | \$139.41 | \$139.52 |
| 70% off 1K | \$98.79 | \$99.49 | \$99.51 | \$100.22 | \$100.81 | \$103.28 | \$106.55 | \$106.29 | \$106.00 | \$105.34 | \$104.91 | \$104.87 | \$104.83 | \$105.75 | \$106.56 | \$106.12 | \$105.78 | \$105.63 | \$105.48 | \$105.07 | \$104.22 | \$104.39 | \$104.49 | \$104.56 | \$104.64 |

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| | |
|---------------------|-------------|
| Category Grade SKU | % in Period |
| R7 4900U 8C 25w | 0.00% |
| R7 4800U 8C 15w | 0.01% |
| R7 4750U 8C 15w | 0.37% |
| R7 4700U 8C 15w | 1.67% |
| R5 4650U 6C 15w | 0.23% |
| R5 4600U 6C 15w | 0.00% |
| R5 4599U 6C 15w | 2.61% |
| R3 4450U 4C 15w | 0.00% |
| R3 4300U 4C 15w | 0.40% |
| Athlon 3150U 2C 15w | 0.51% |
| Athlon 3050U 2C 15w | 2.10% |
| i7 10810U 6C 15/25w | 1.65% |
| i7 10710U 6C 15/25w | 5.67% |
| i7 10610U 4C 15/25w | 2.02% |
| i7 10510U 4C 15/25w | 31.50% |
| i5 10310U 4C 15/25w | 1.68% |
| i5 10210U 4C 15/25w | 43.14% |
| i3 10110U 2C 15/25w | 6.45% |
| | 100.00% |

Analysis –

On INTC q2 2020 financial CCG / DCG revenue split identifies on channel inventory and value data a 25% Core Line and 75% DCG Xeon discount off INTC \$1K. Normalizing channel data to validate Intel volume discount suggests 10K division revenue split remains misrepresented; DCG revenue continues to subsidize CCG.

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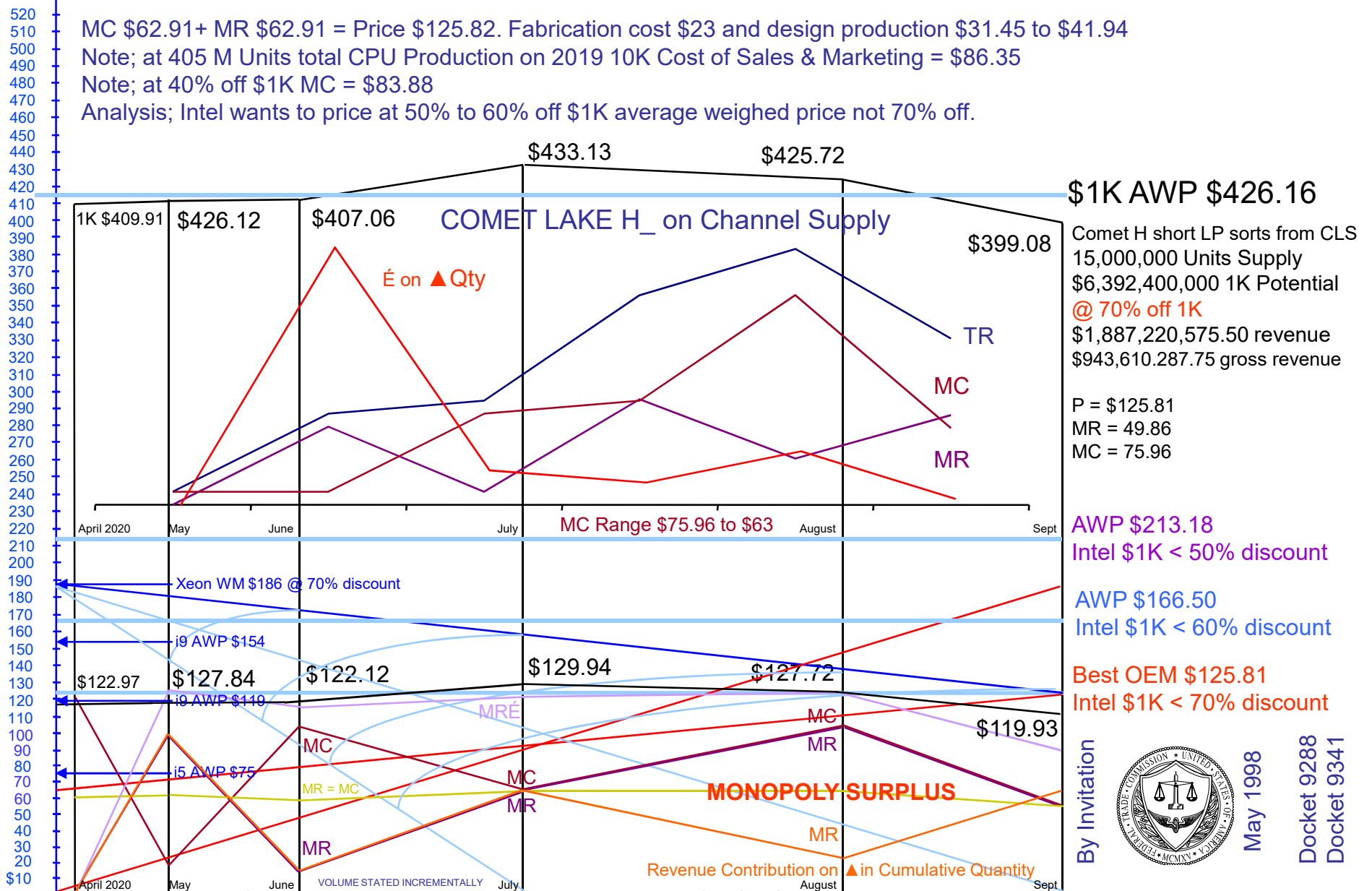


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Quantity per month determined on percent of total channel supply per month over six months; 2 quarters

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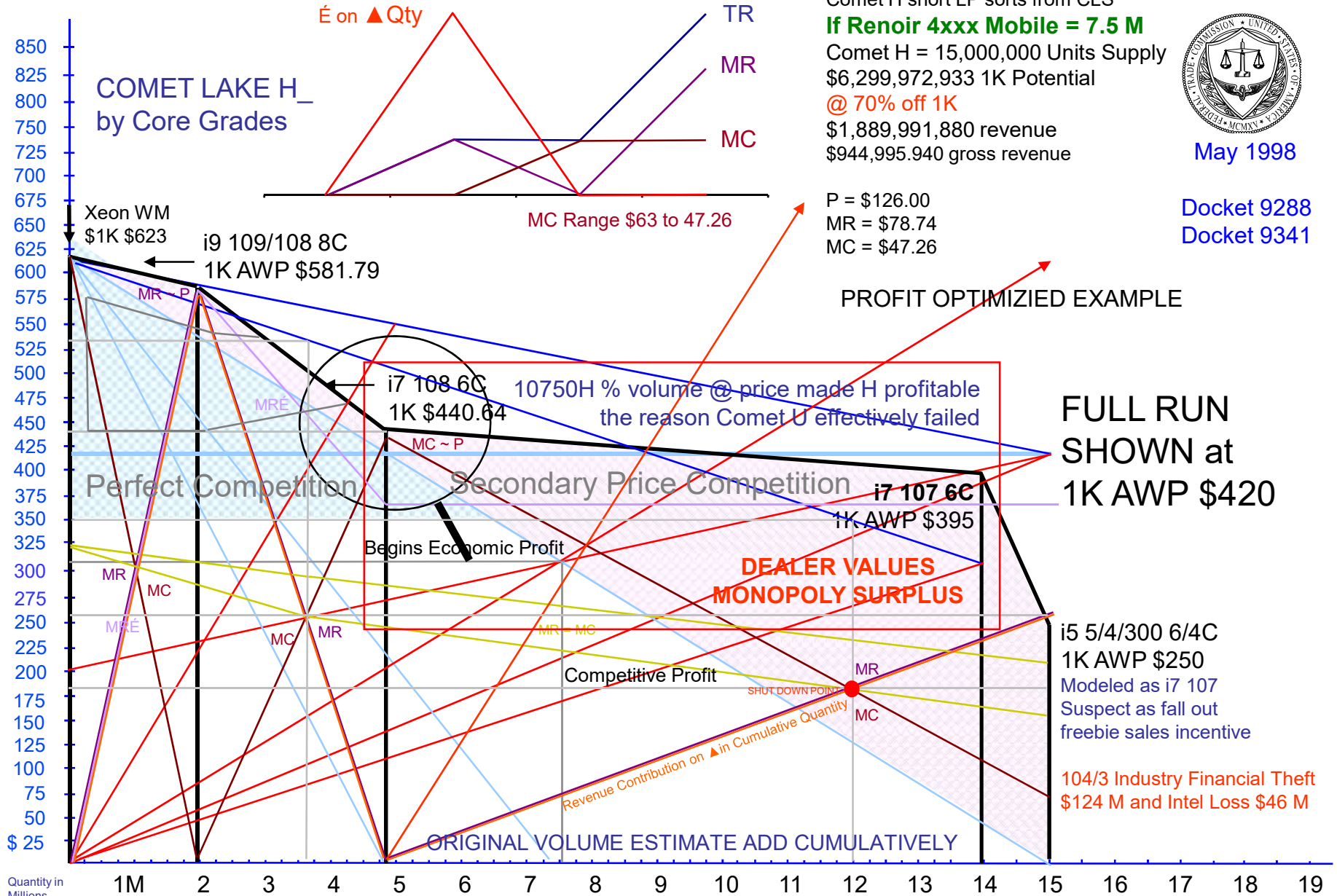
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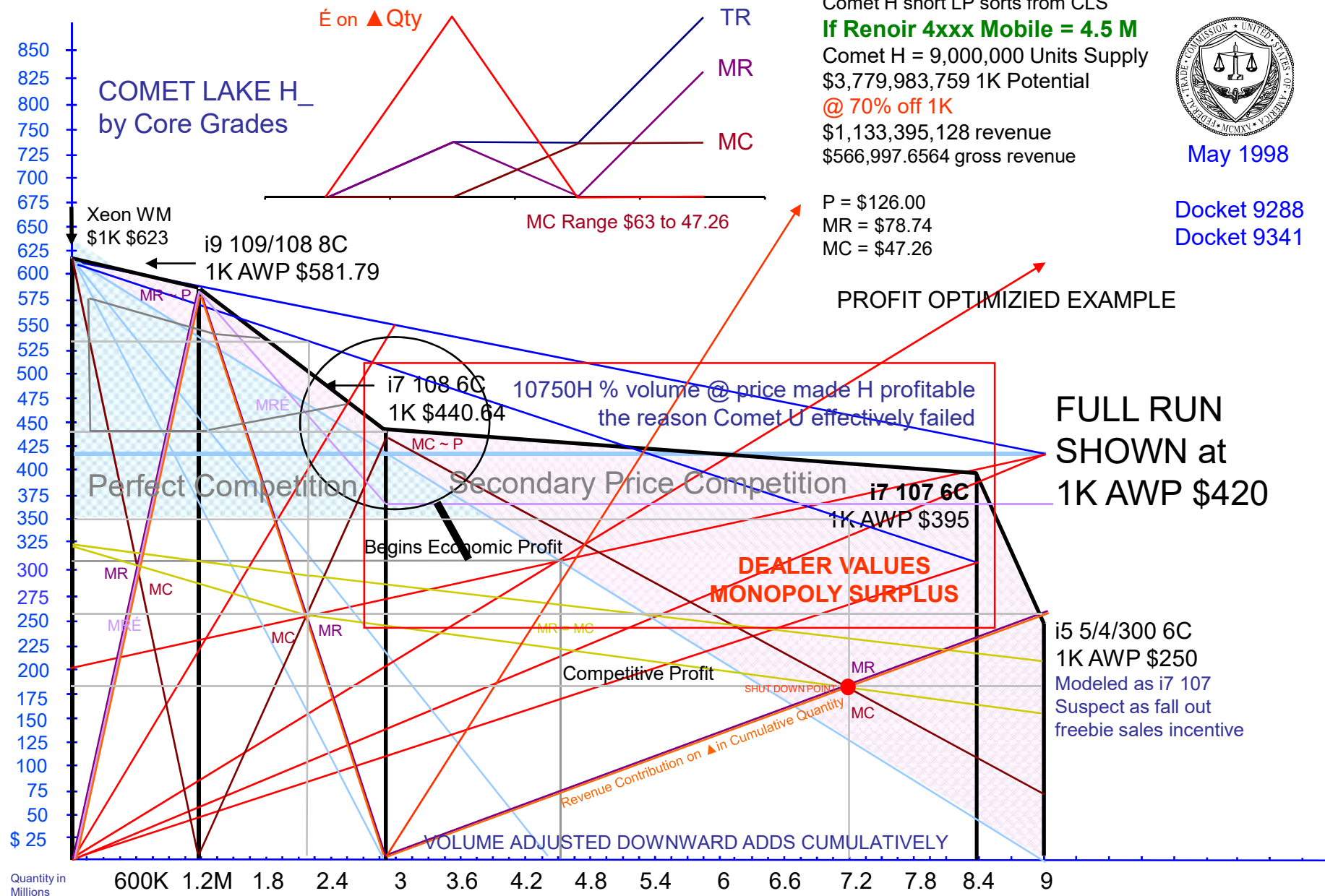
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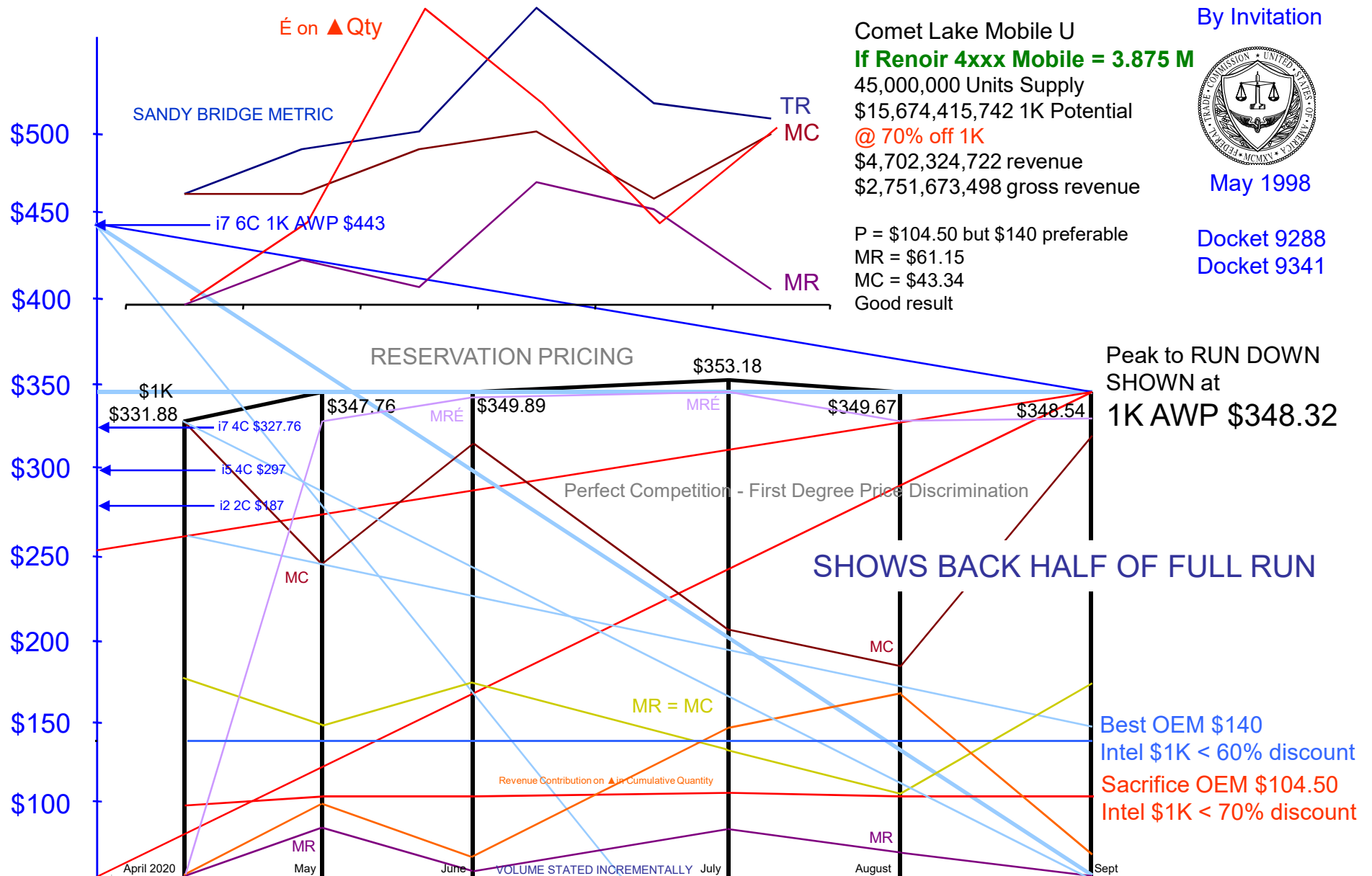


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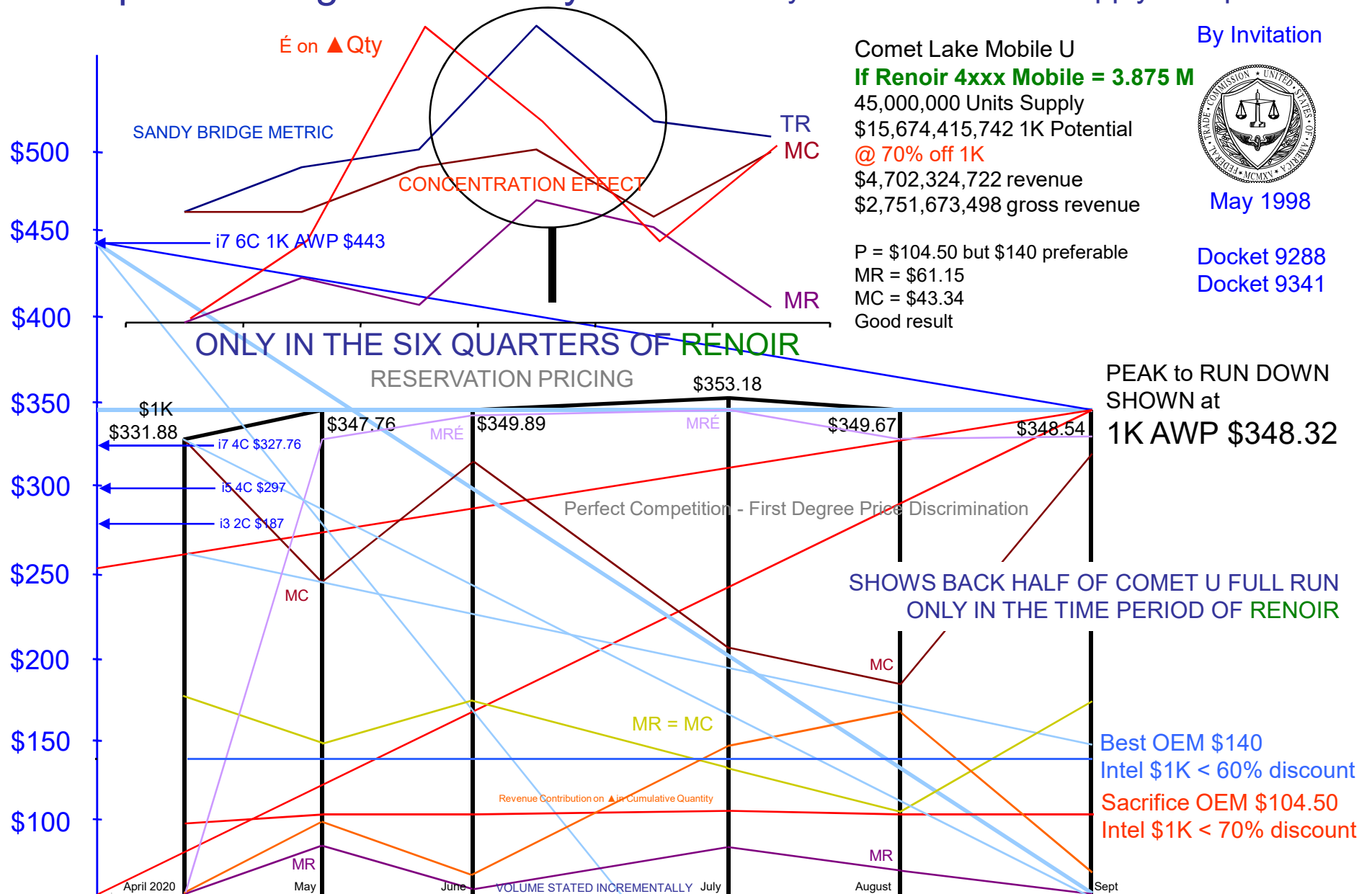
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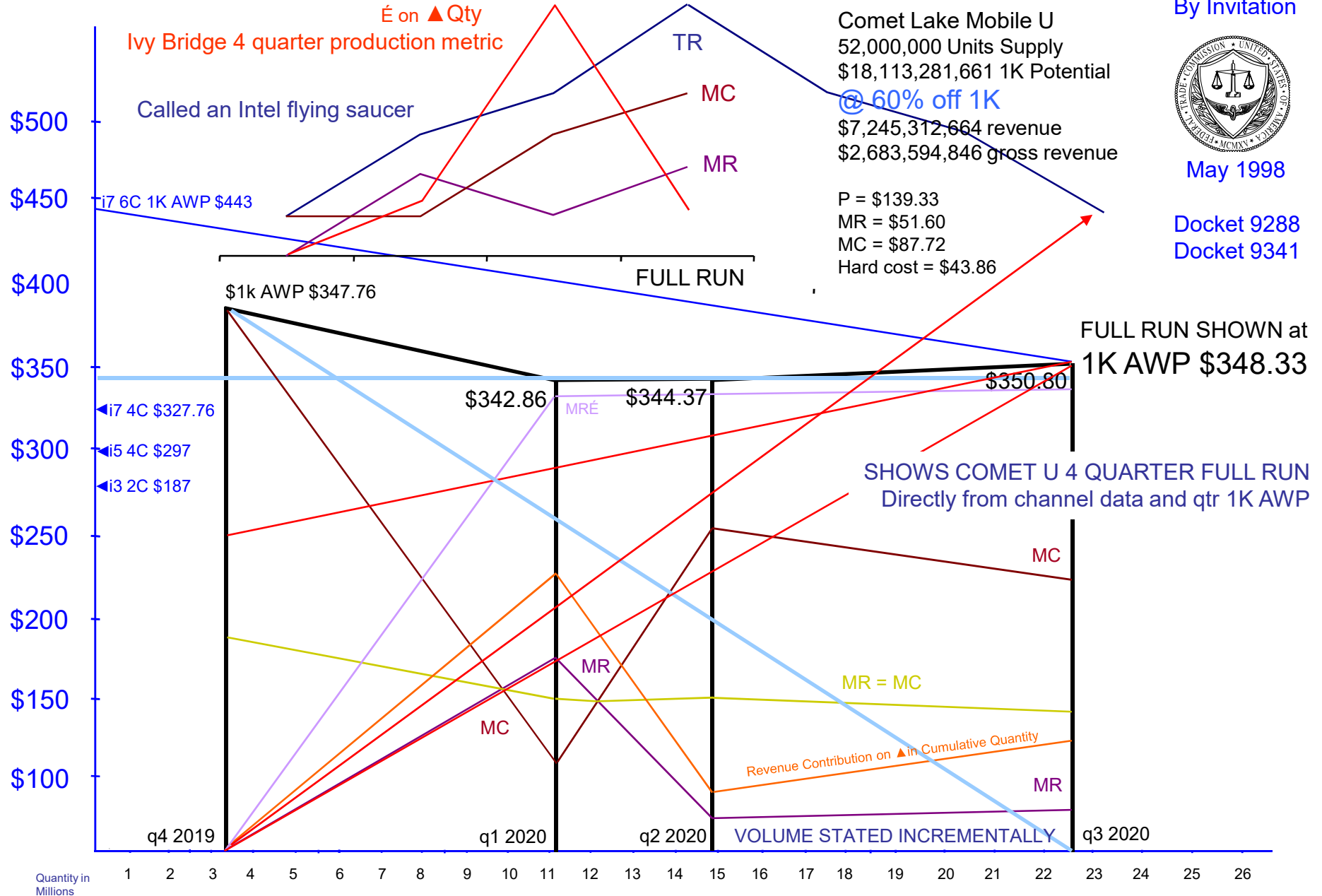
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Comet Lake Mobile U

52,000,000 Units Supply

\$18,113,296,546 1K Potential

@ 60% off 1K

\$7,247,318,618 revenue

\$3,799,005,516 gross revenue

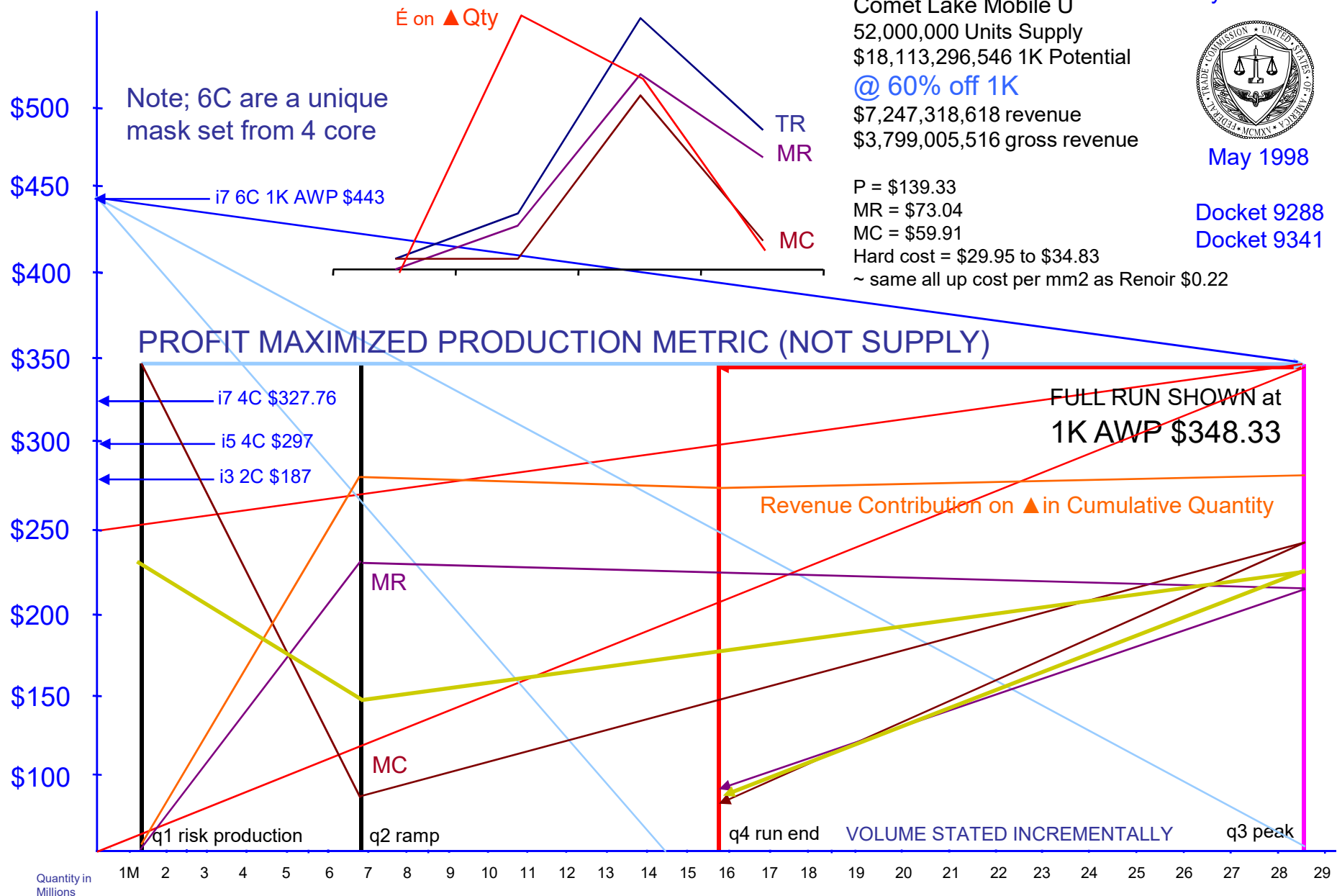
$$P = \$139.33$$

MR = \$73.04

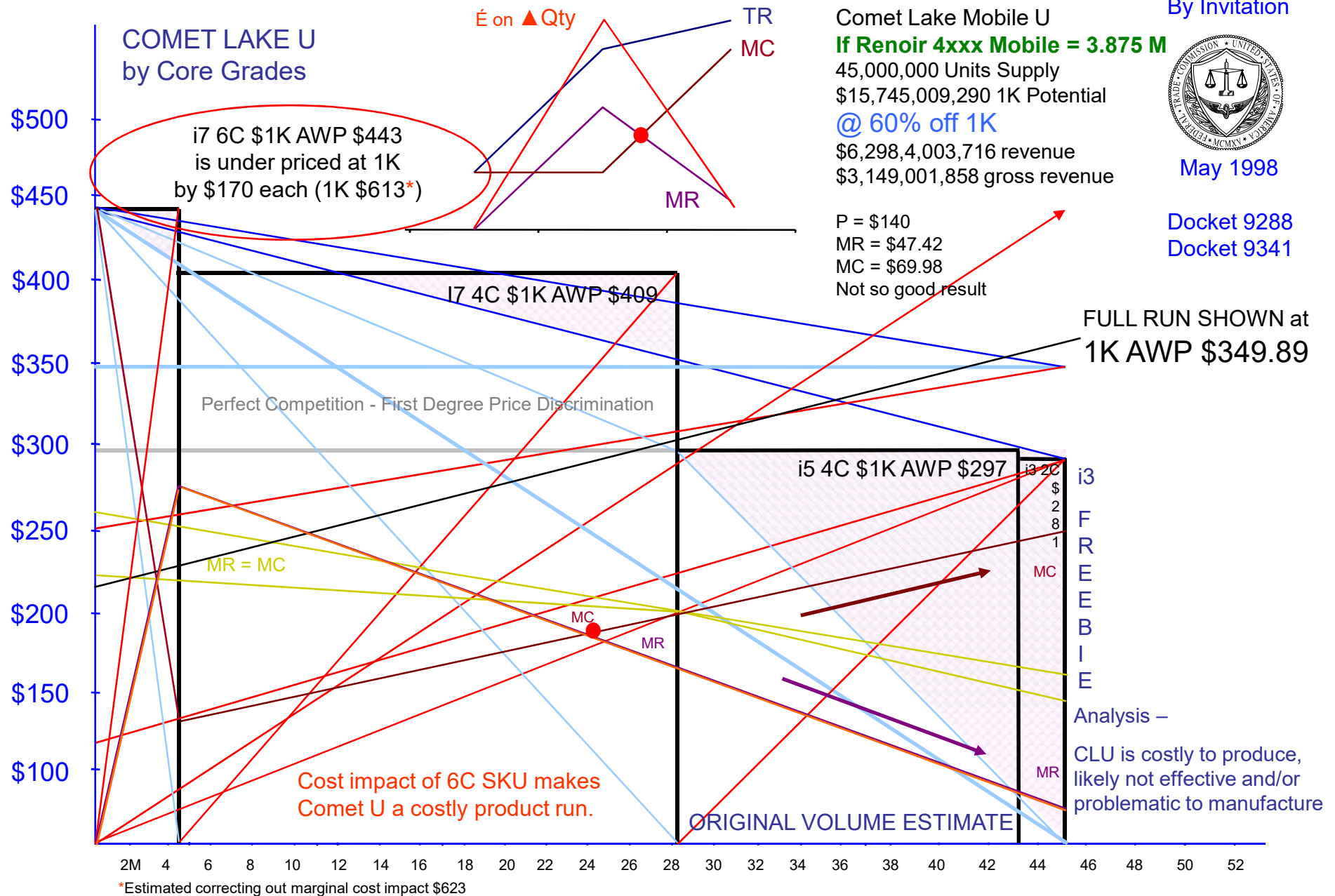
$$MC = \$59.91$$

Hard cost = \$29.95 to \$34.83

~ same all up cost per mm2 as Renoir \$0.22

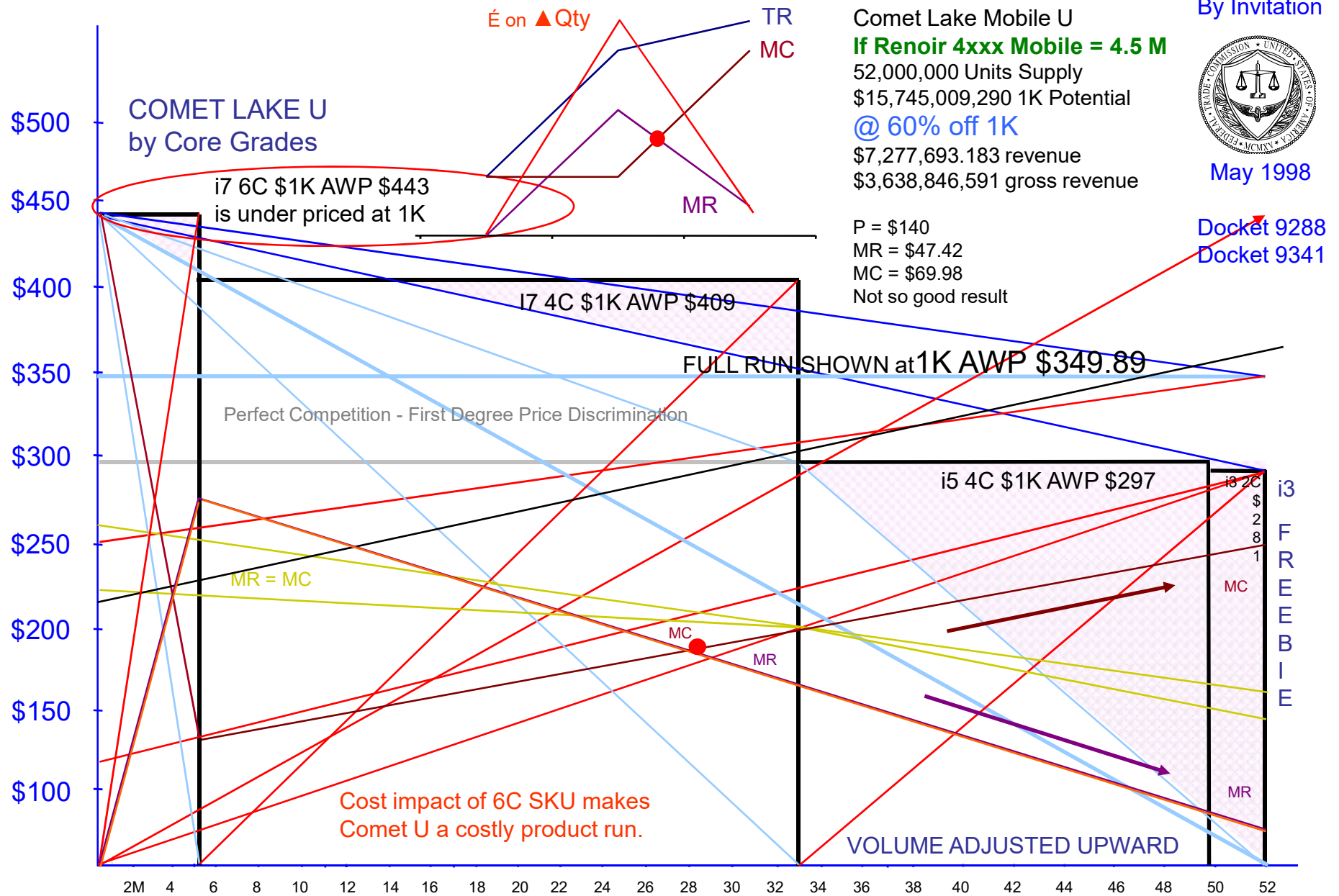


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*Estimated correcting out marginal cost impact \$623

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Industrial Financial Theft @ P \$1K < 60%

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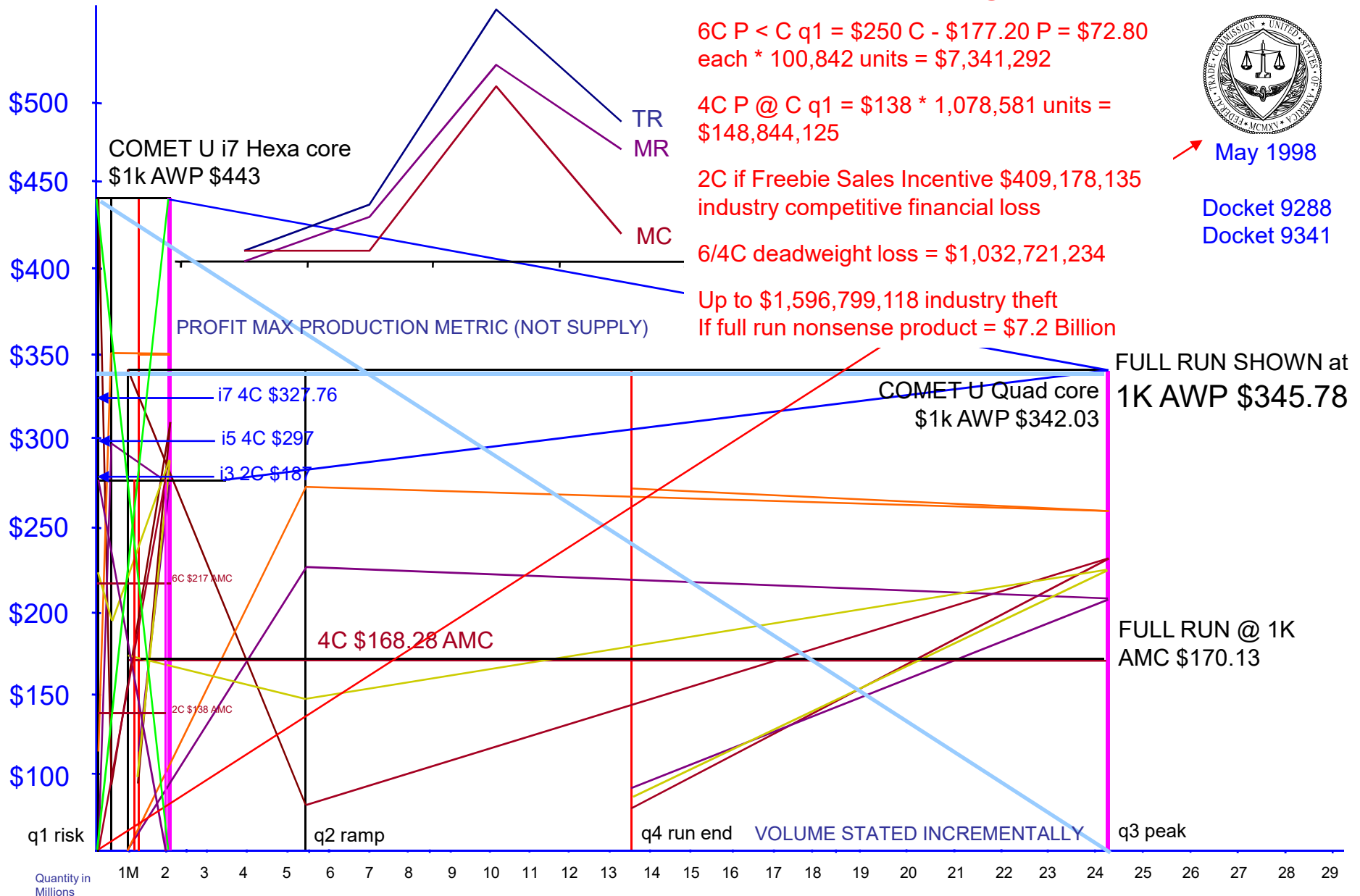
6C P < C q1 = \$250 C - \$177.20 P = \$72.80
each * 100,842 units = \$7,341,292

4C P @ C q1 = \$138 * 1,078,581 units =
\$148,844,125

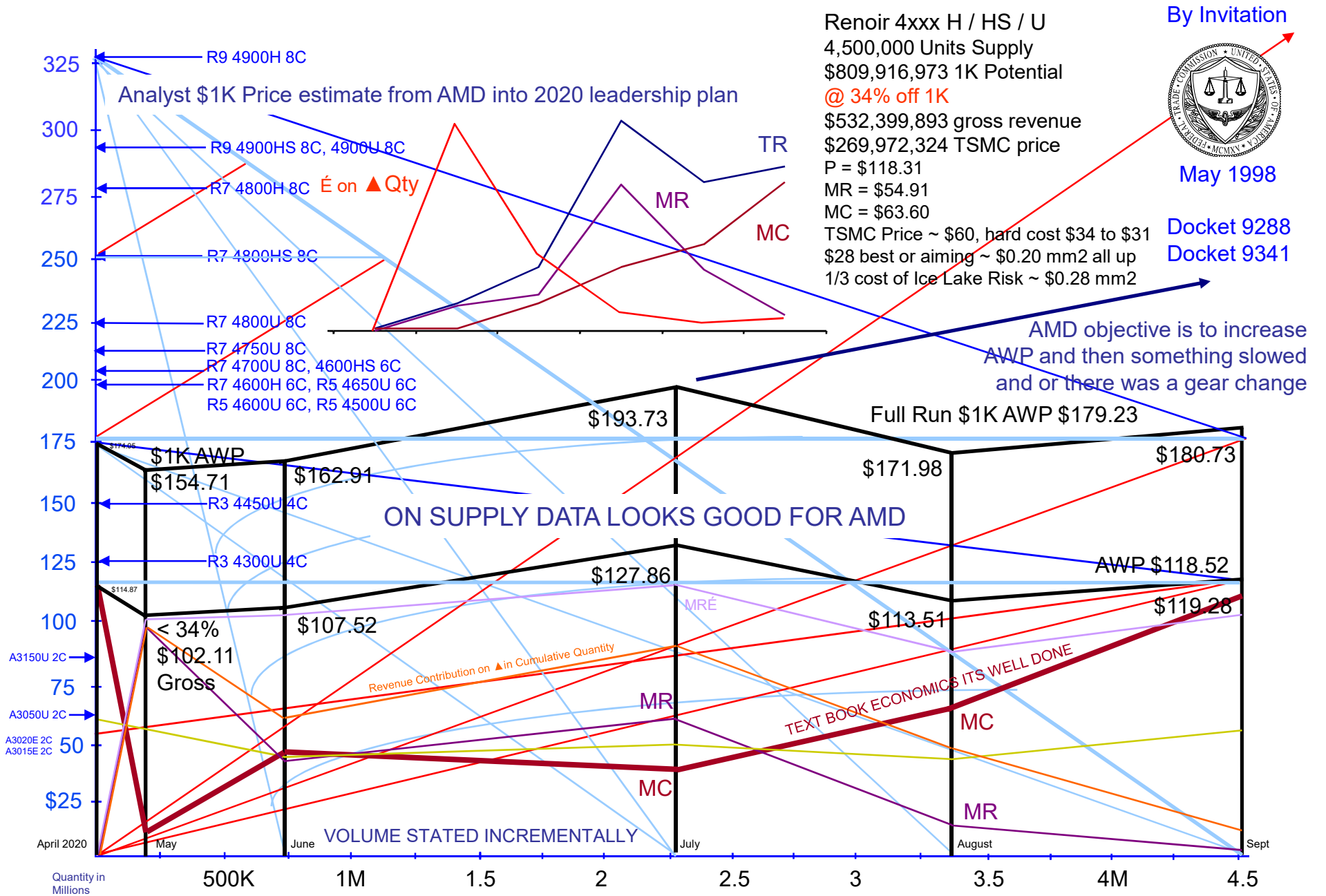
2C if Freebie Sales Incentive \$409,178,135
industry competitive financial loss

6/4C deadweight loss = \$1,032,721,234

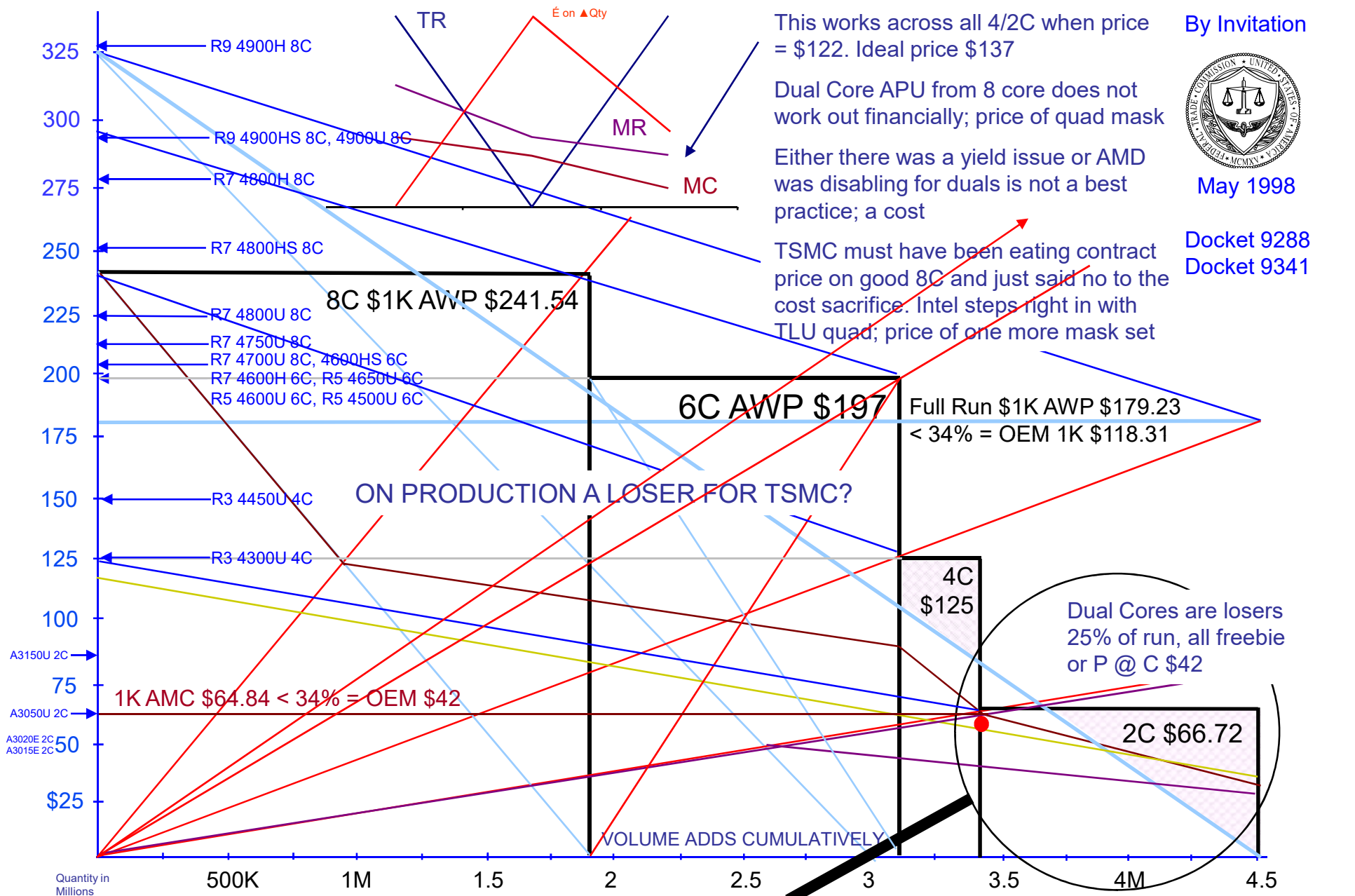
Up to \$1,596,799,118 industry theft
If full run nonsense product = \$7.2 Billion



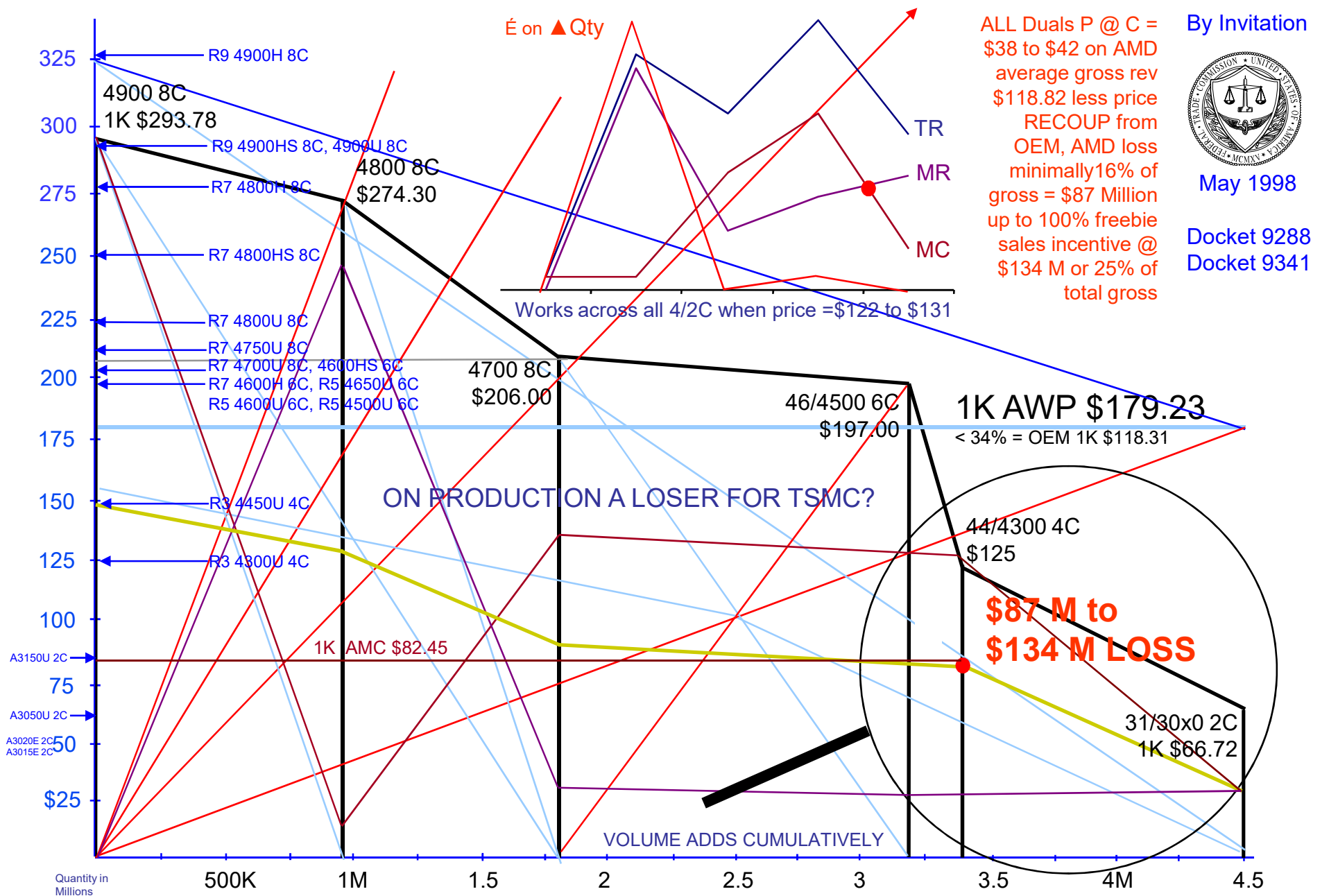
Camp Marketing Consultancy – Mobile Today on first 25 Weeks Supply Comparison



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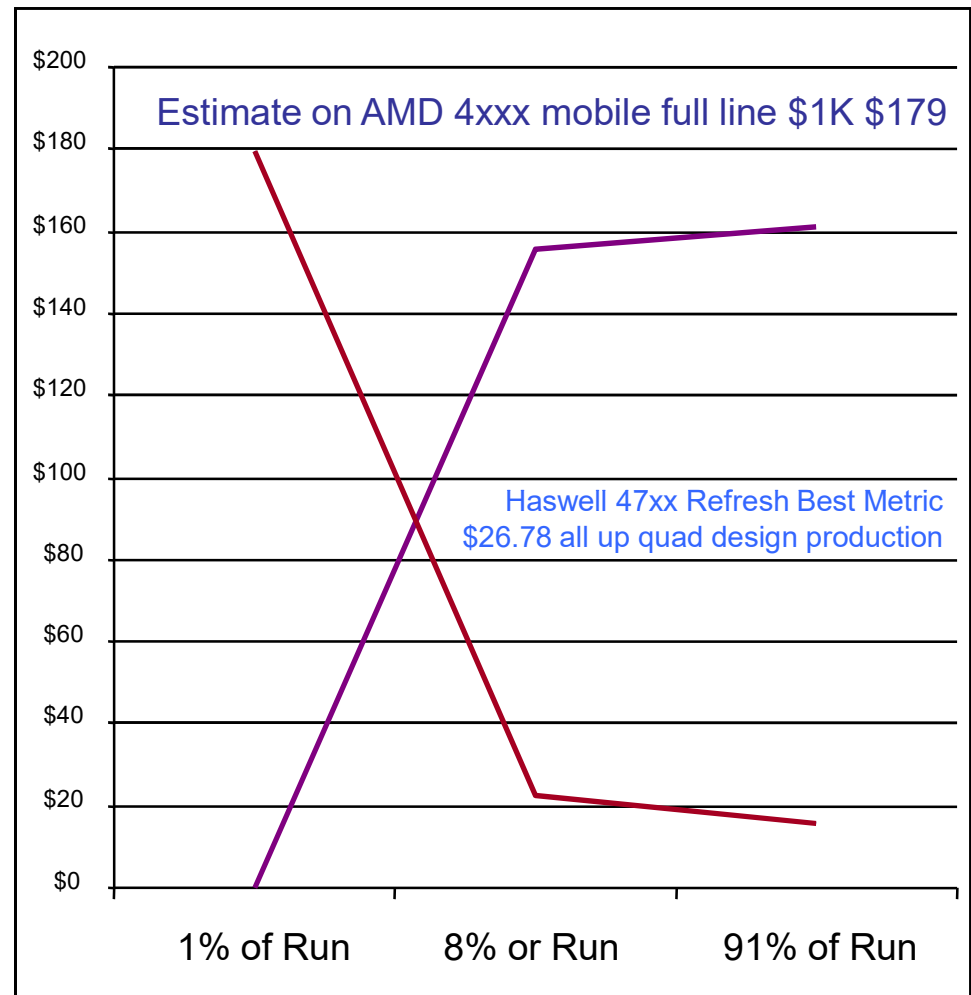
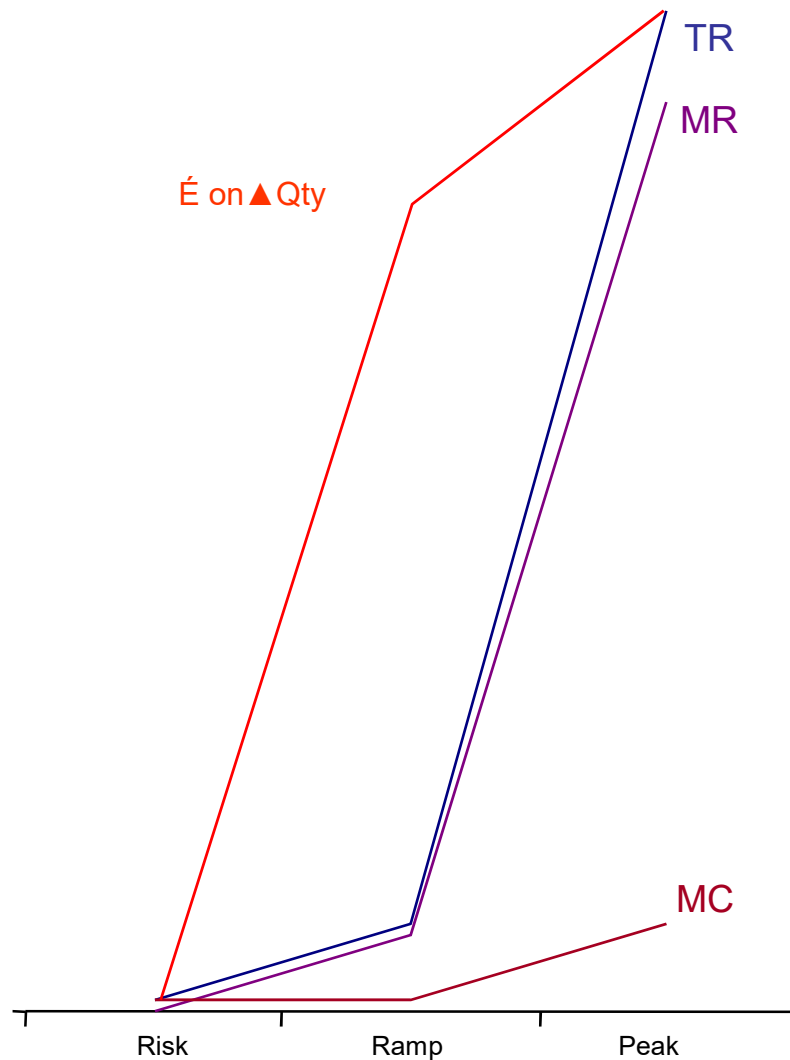
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TSMC Cost Estimate

TSMC design production low \$28.78 / 149 mm² all up = \$0.18 mm²
Hard Fabrication \$15.84 / 149 mm² = \$0.10.6 mm² of silicon area



STAY TUNE FOR INTEL ICE LAKE NOW IN DEVELOPMENT

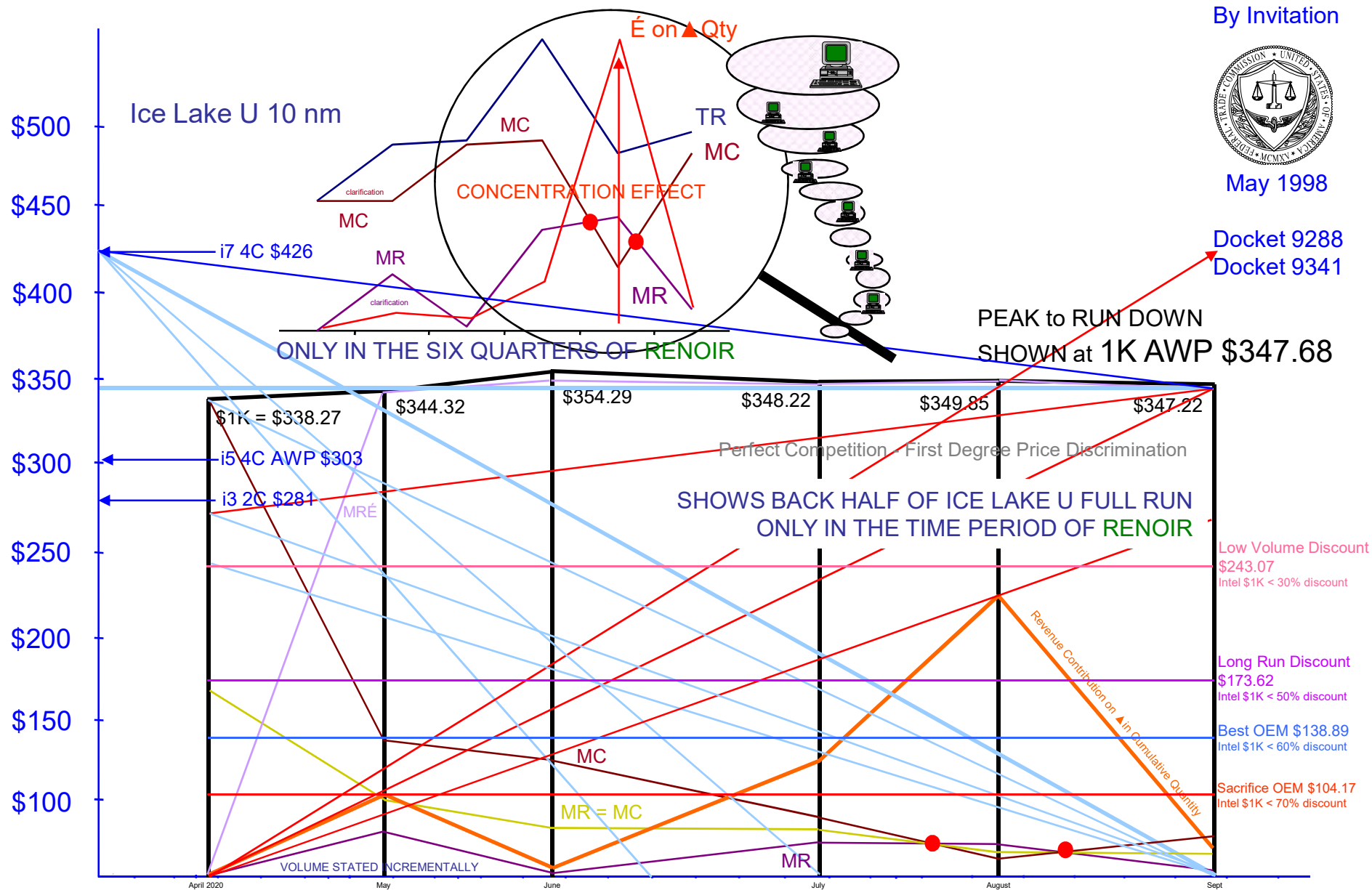
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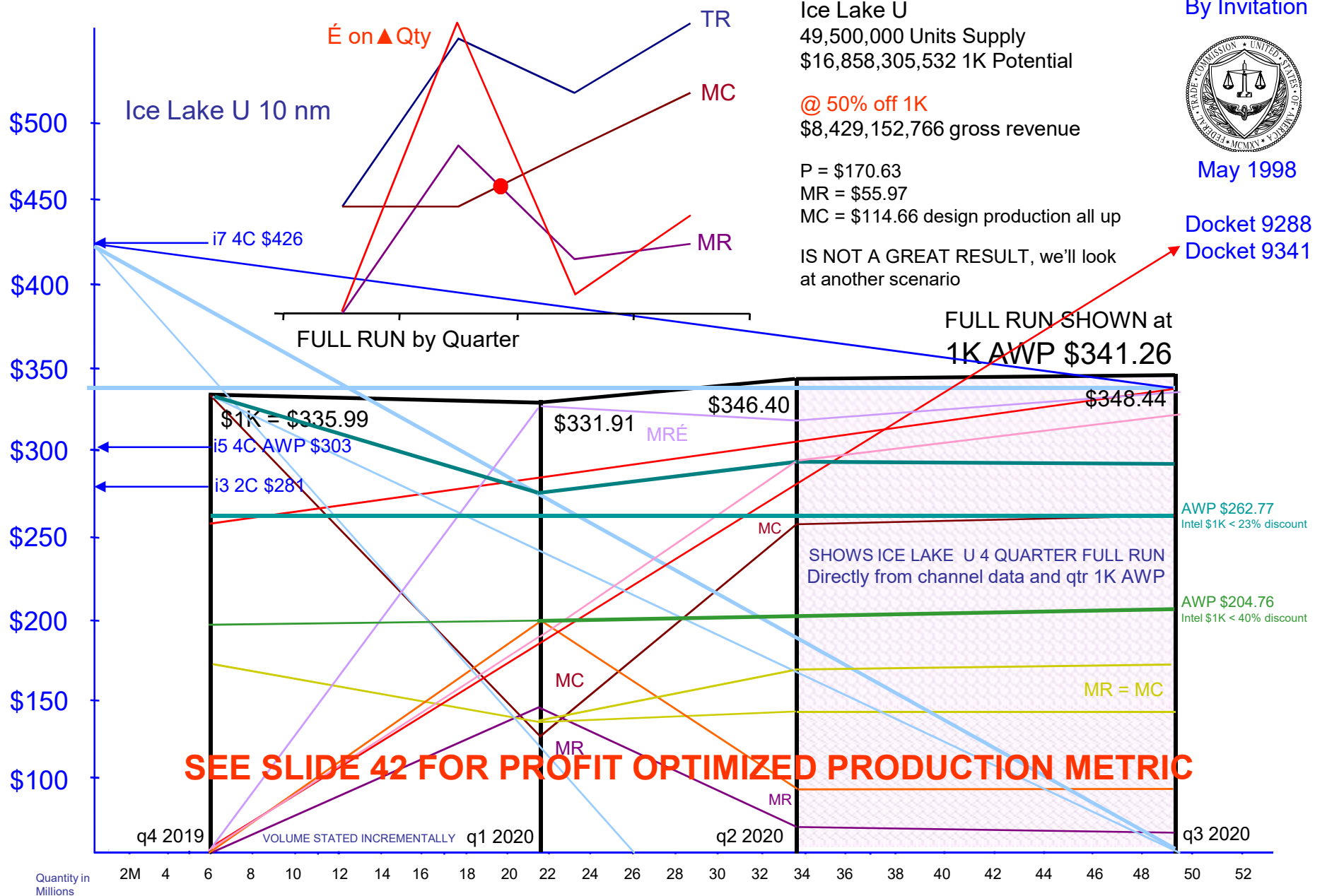
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Quantity per month determined on percent of total channel supply per month over six months; 2 quarters

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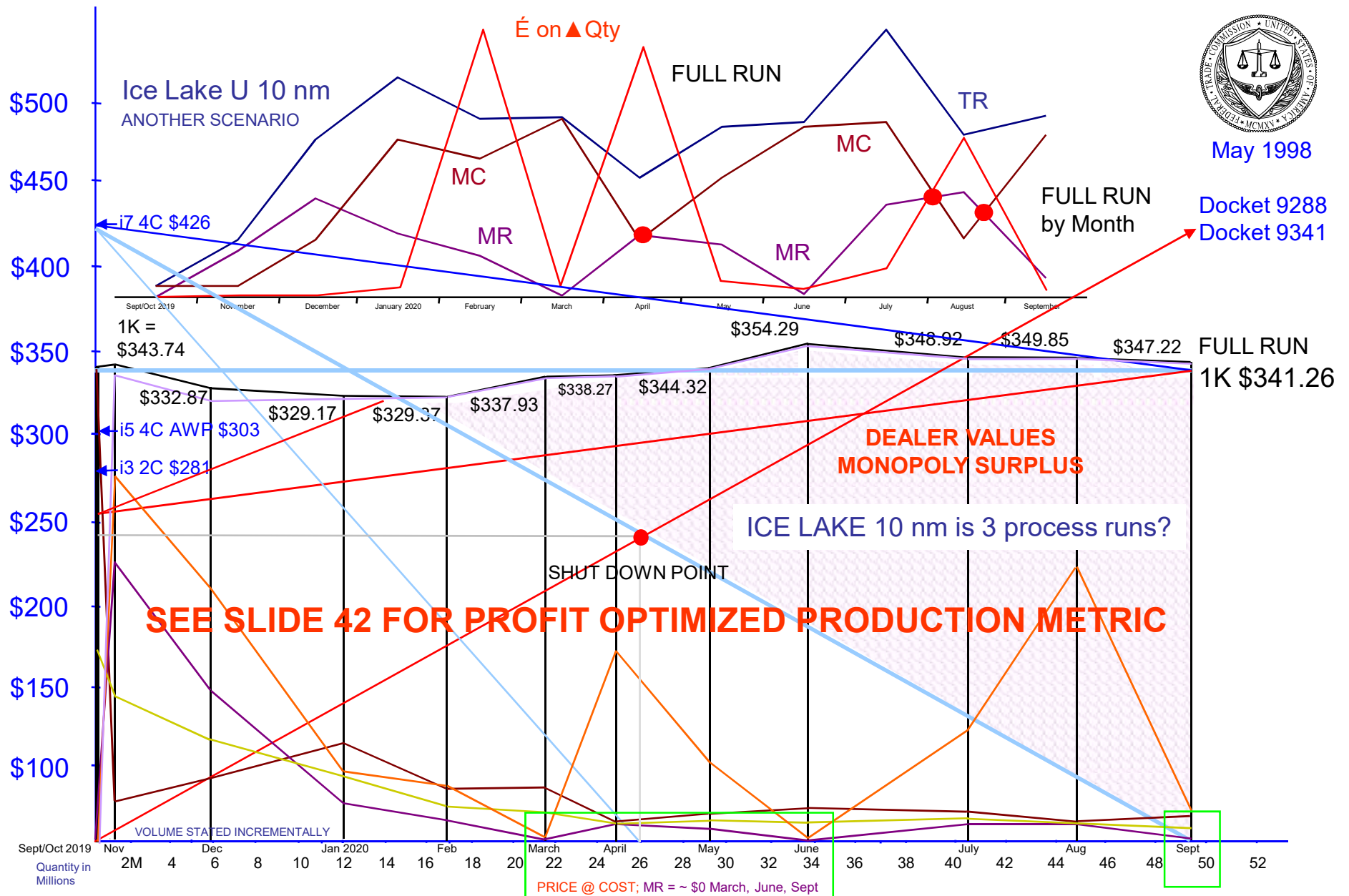
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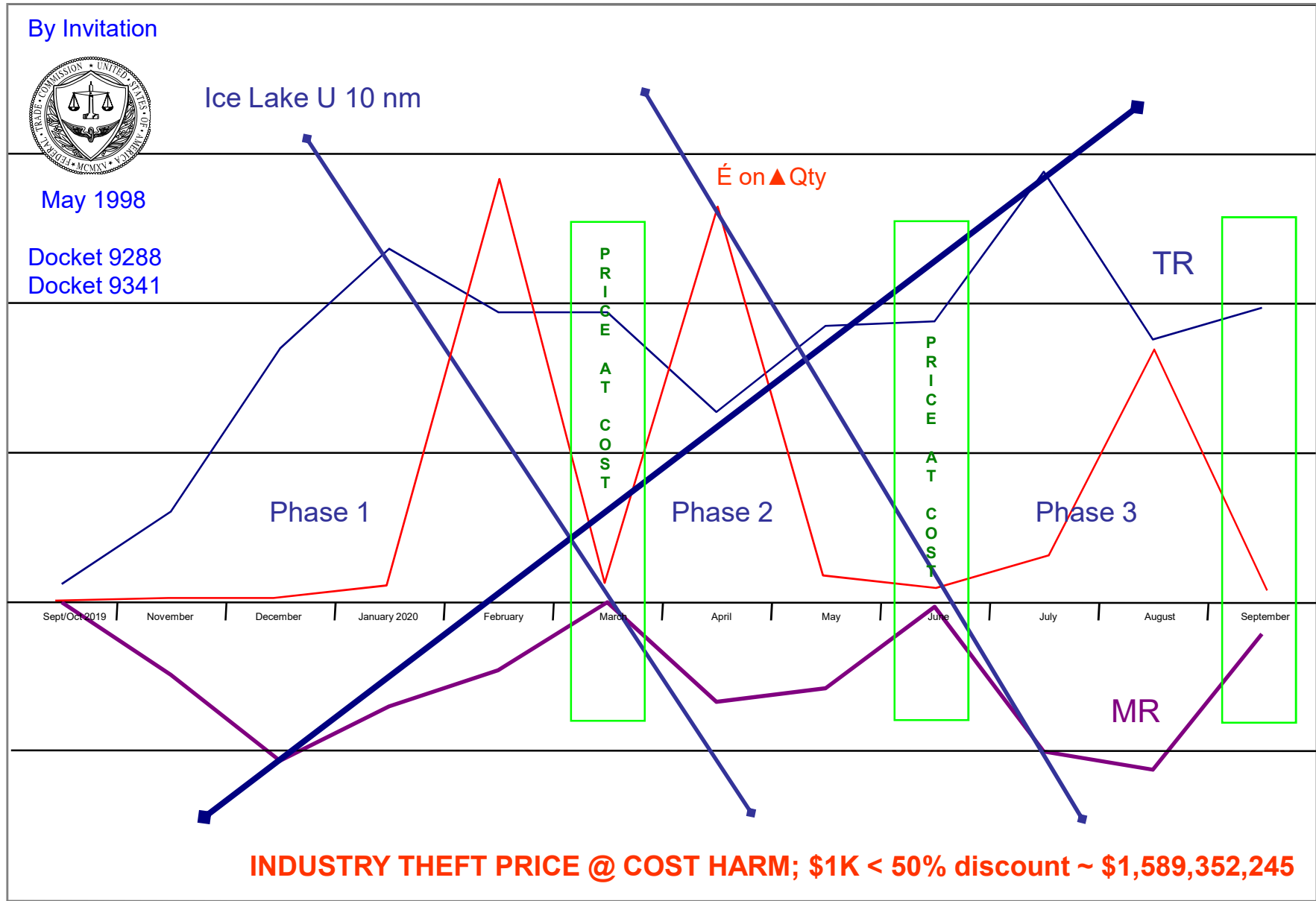


May 1998

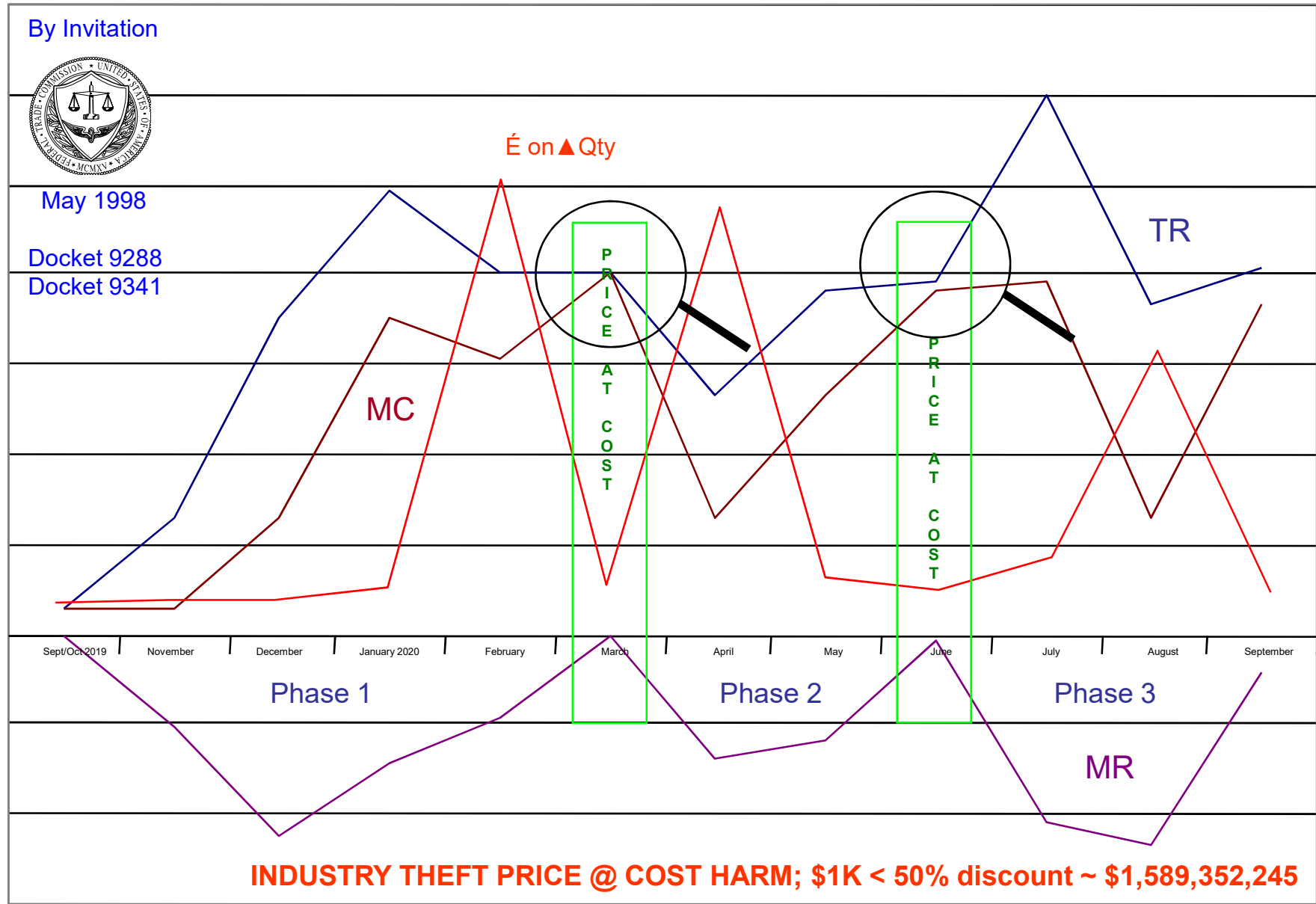
Docket 9288
Docket 9341



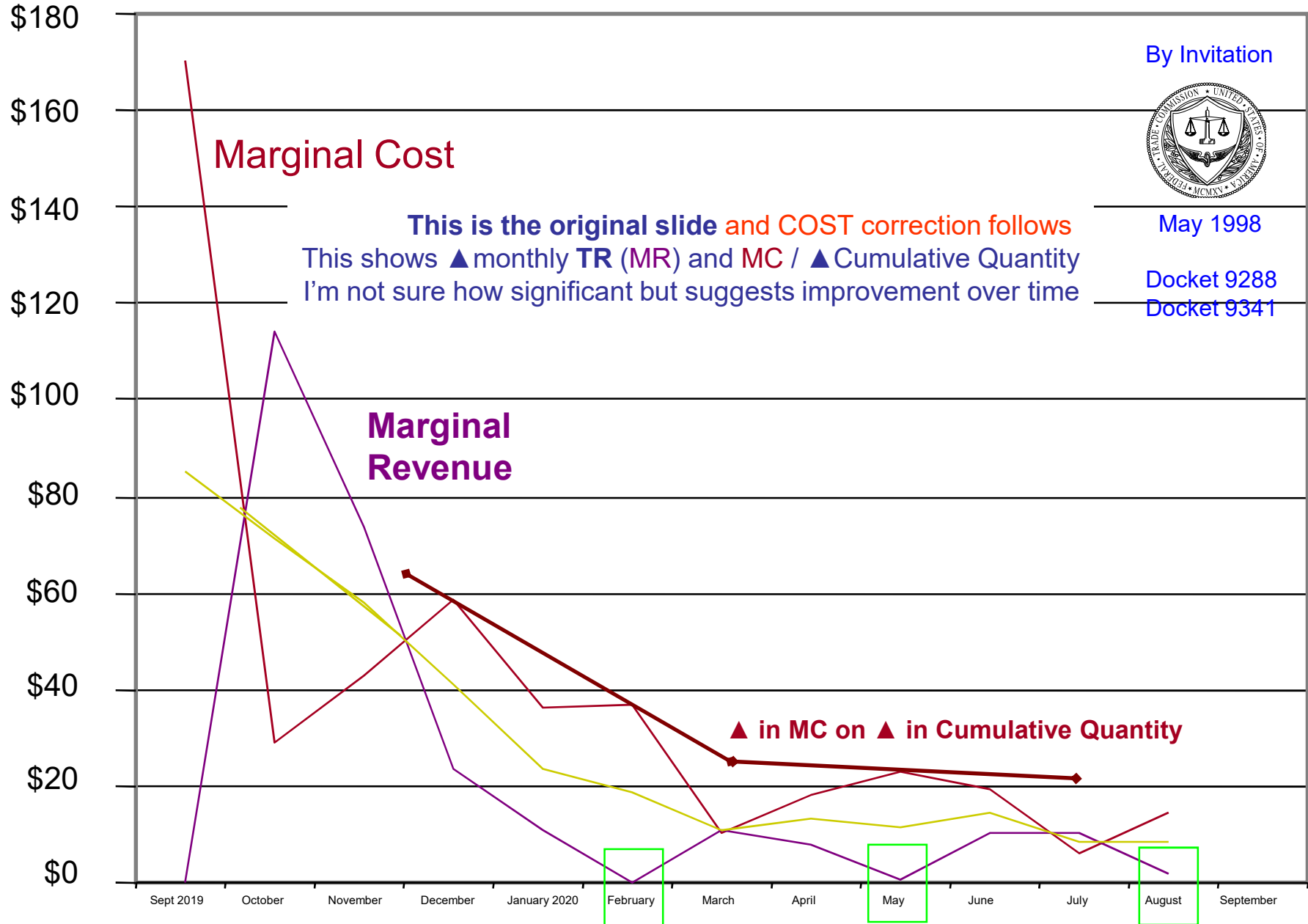
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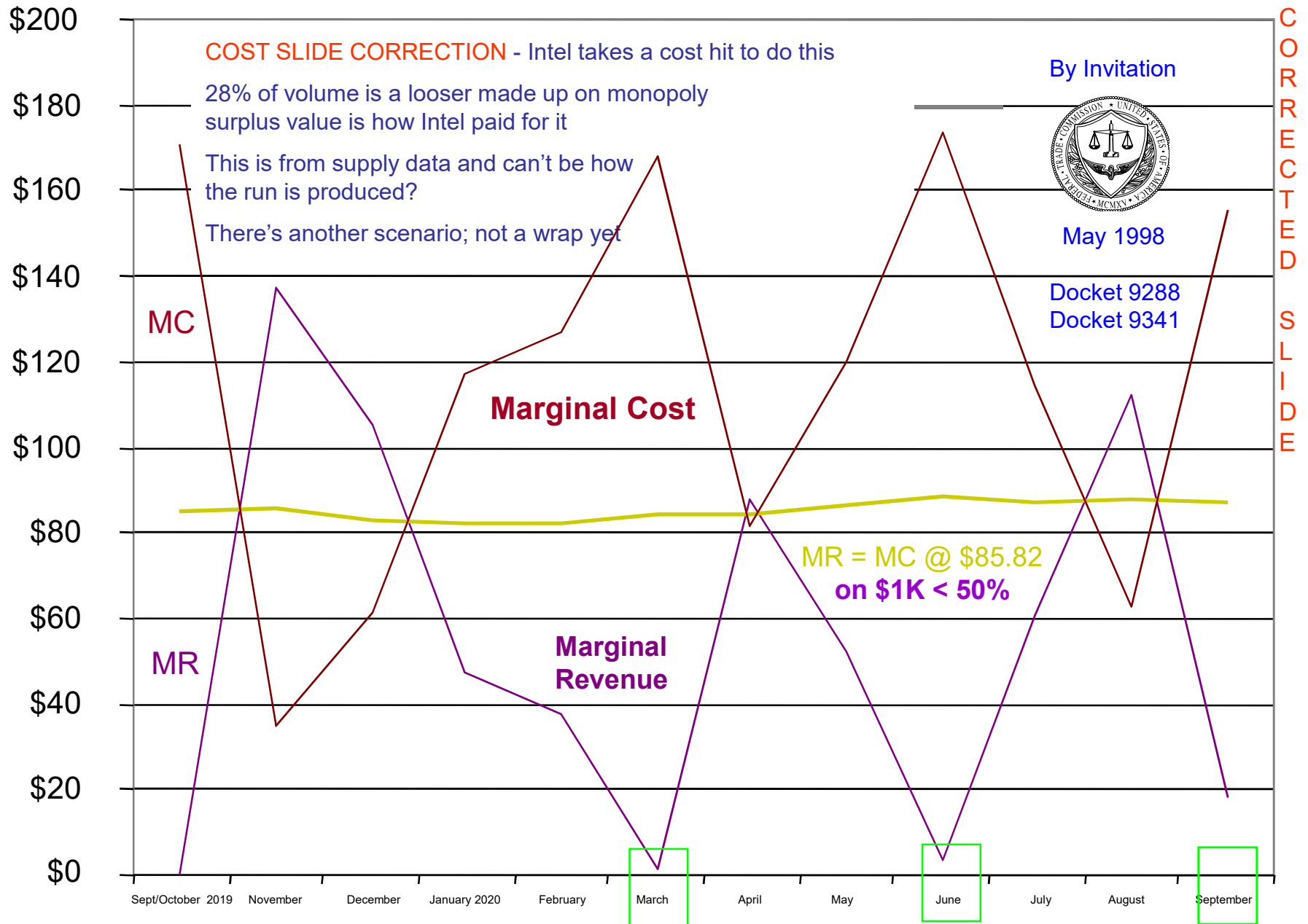
Camp Marketing Consultancy – Mobile Today on first 25 Weeks Supply Comparison



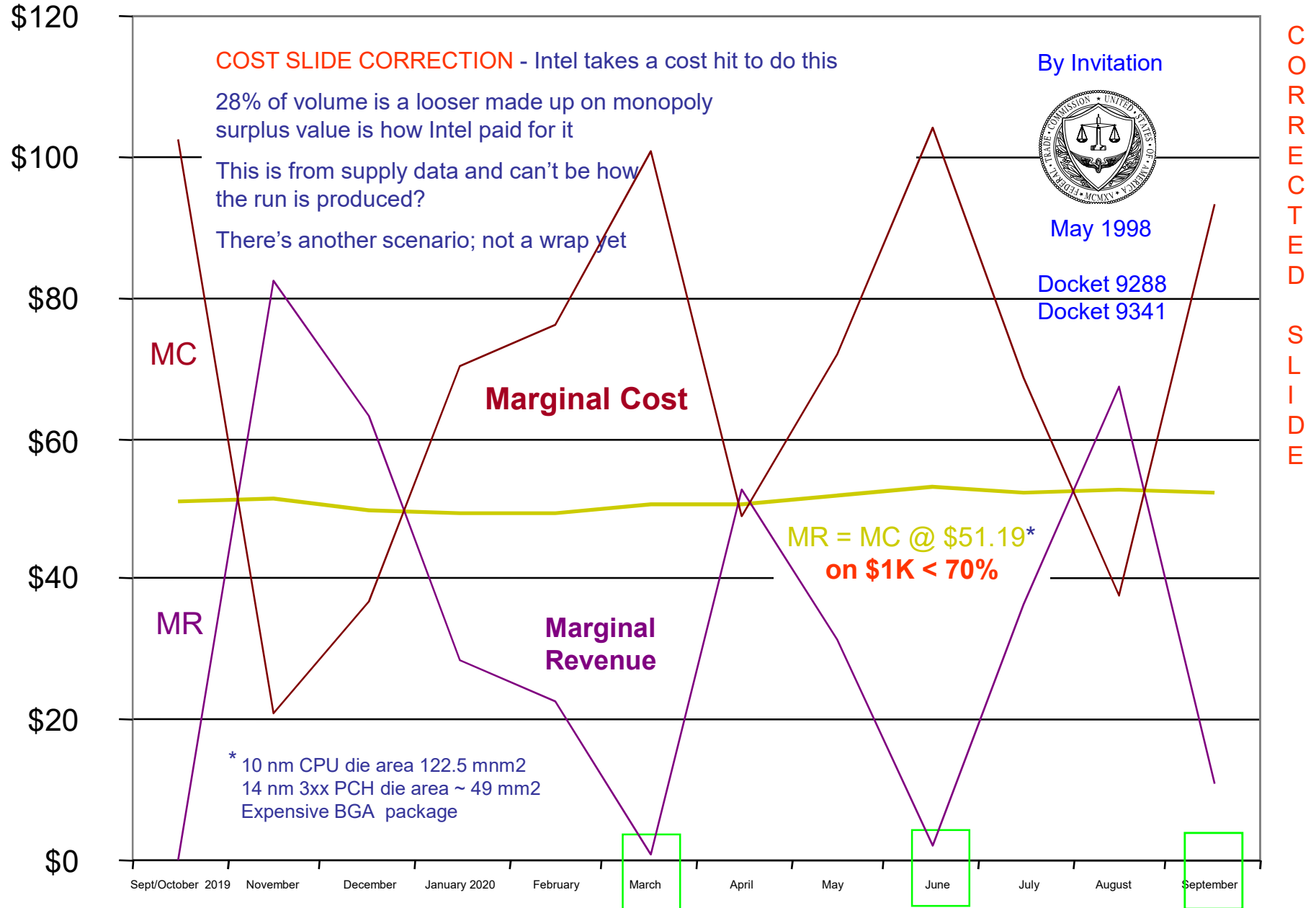
Camp Marketing Consultancy – Mobile Today on first 25 Weeks Supply Comparison



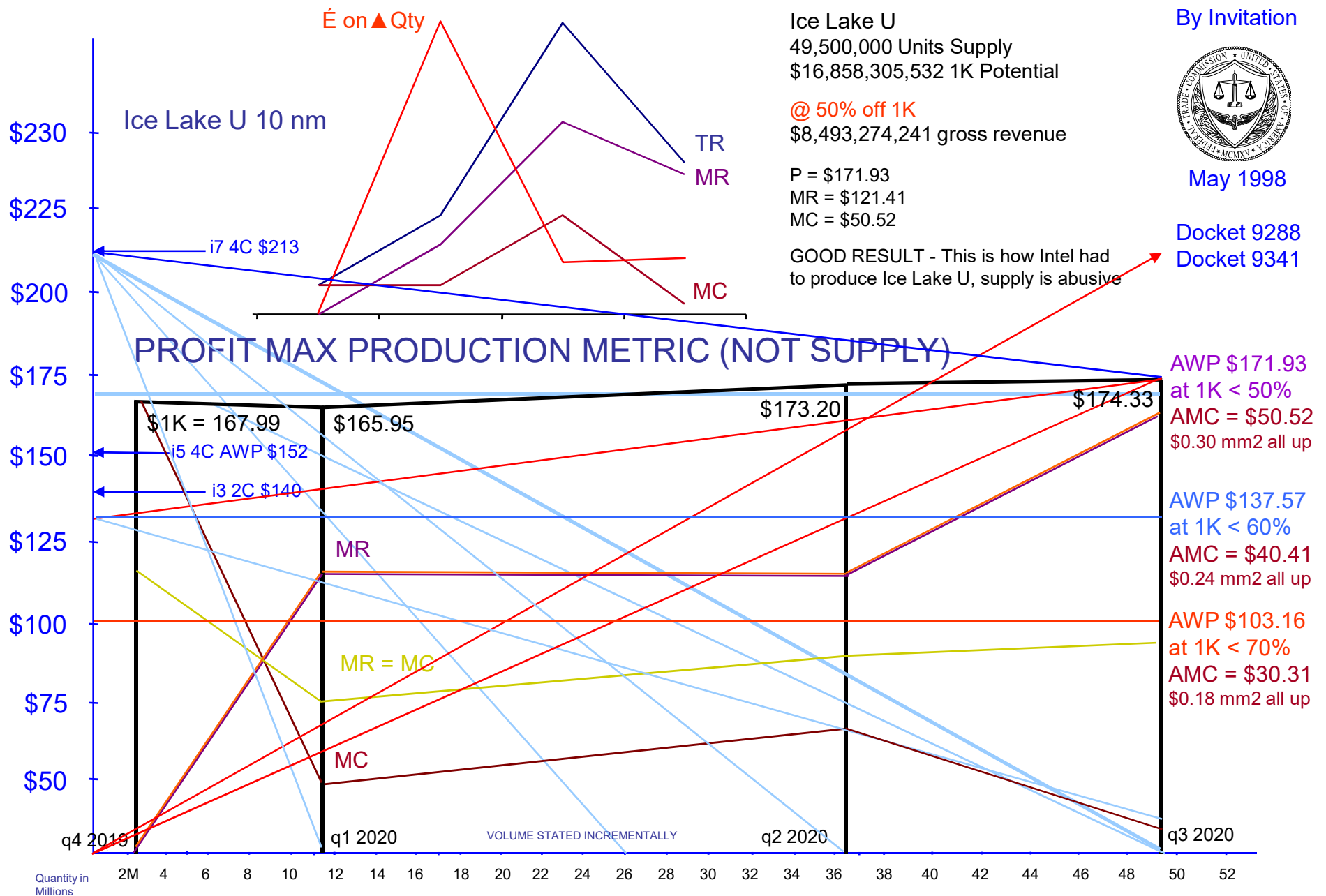
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Camp Marketing Consultancy – Mobile Today on first 25 Weeks Supply Comparison



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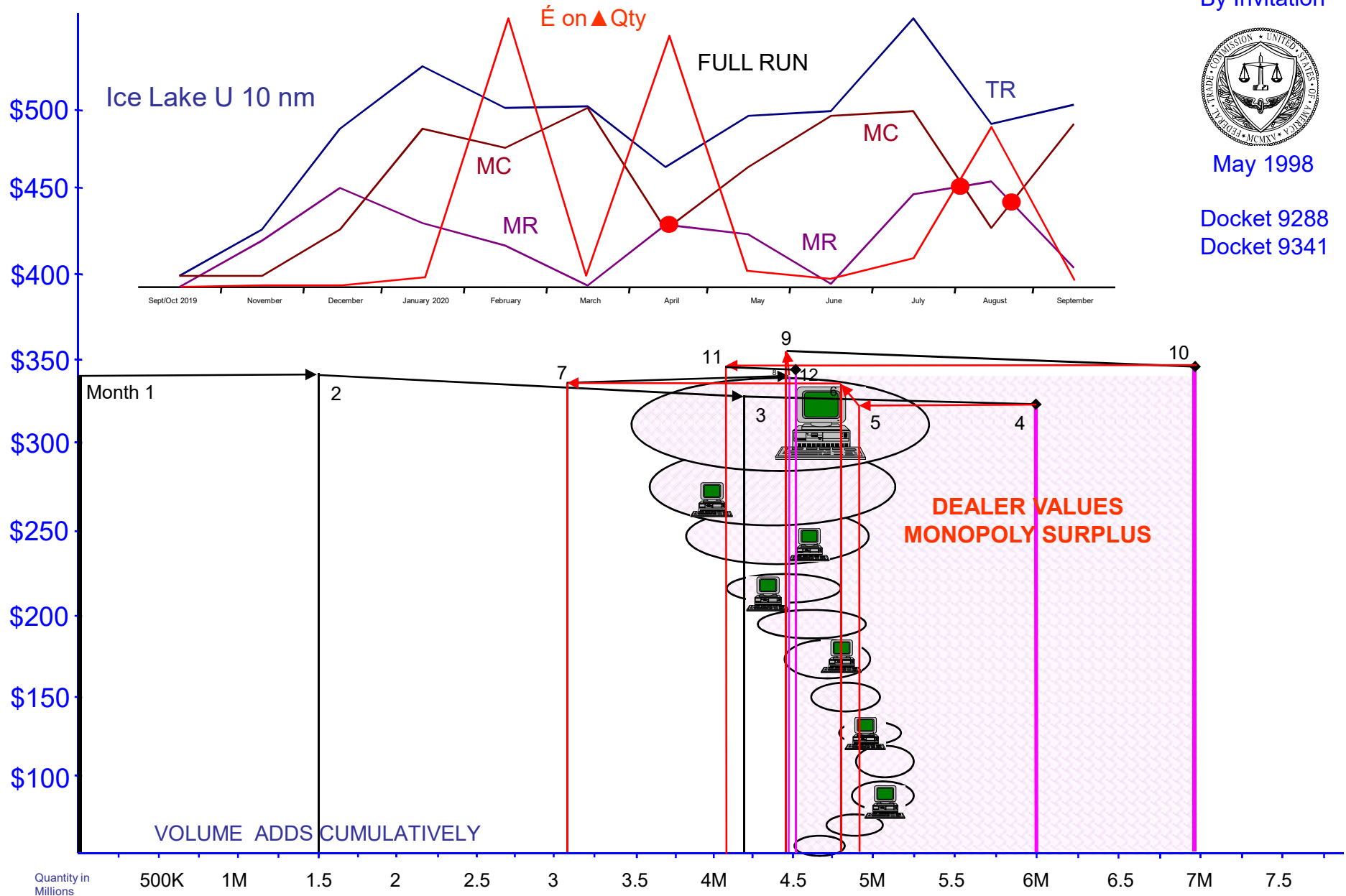
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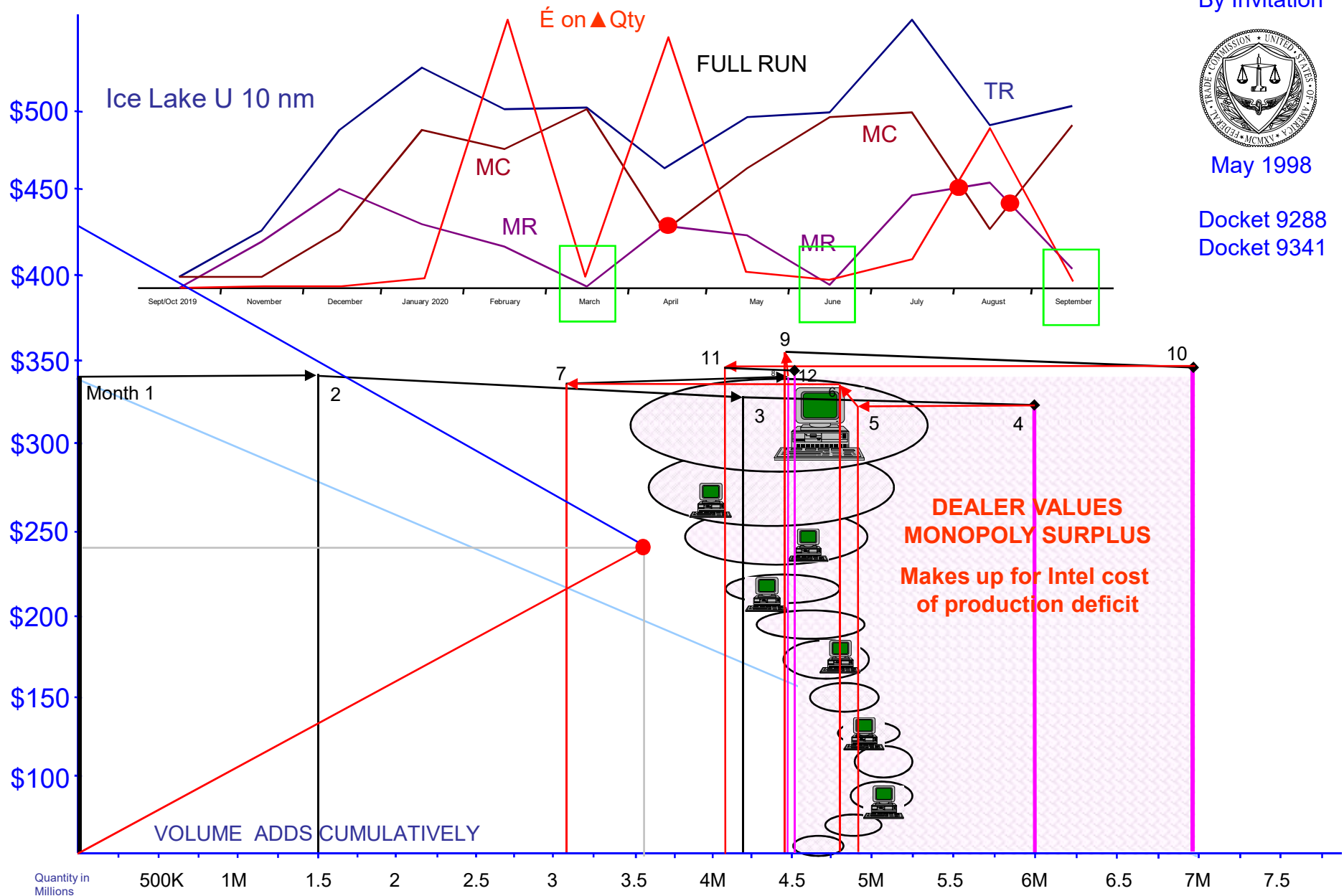
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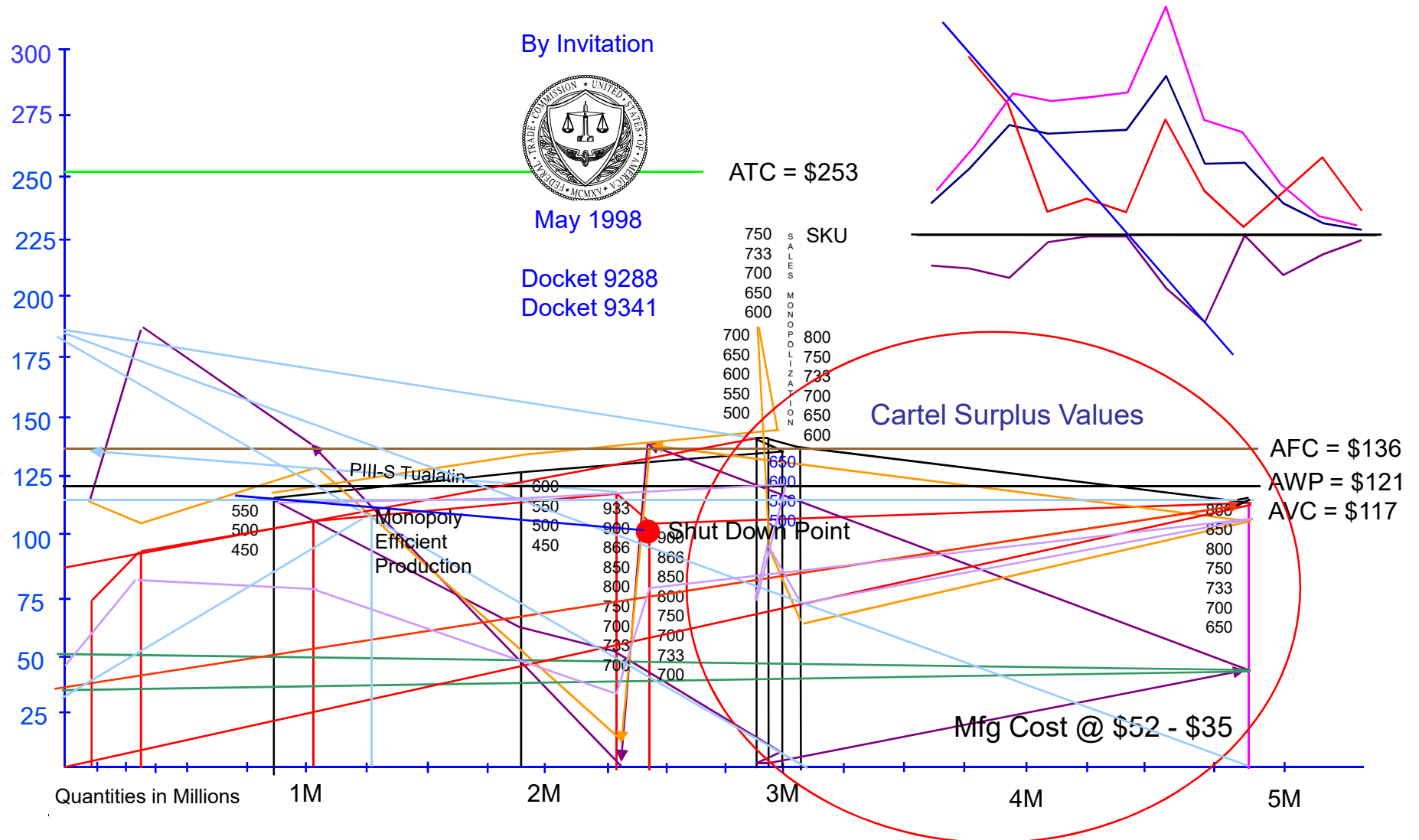
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Camp Marketing Consultancy

Celeron Pentium III Mobile Value Copper mine 128 L2, 450 MHz to 933 MHz, .18 micron, 106 mm sq, q1 2000 – q4 2002, 25,790,000 Units, 1K Revenue \$3,132,065,000



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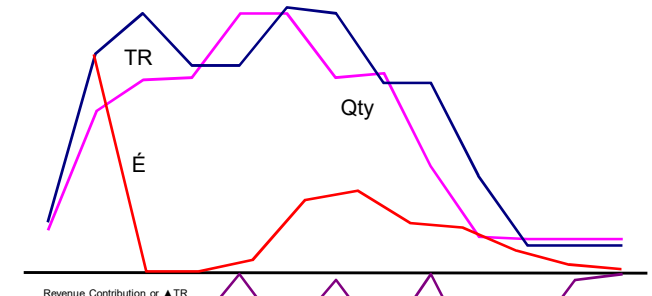
Xeon Paxville + Tulsa

5,386,128 Units to 6,222,256 Units

\$10,737,631,496 Revenue Low

\$11,295,031,496 Revenue High

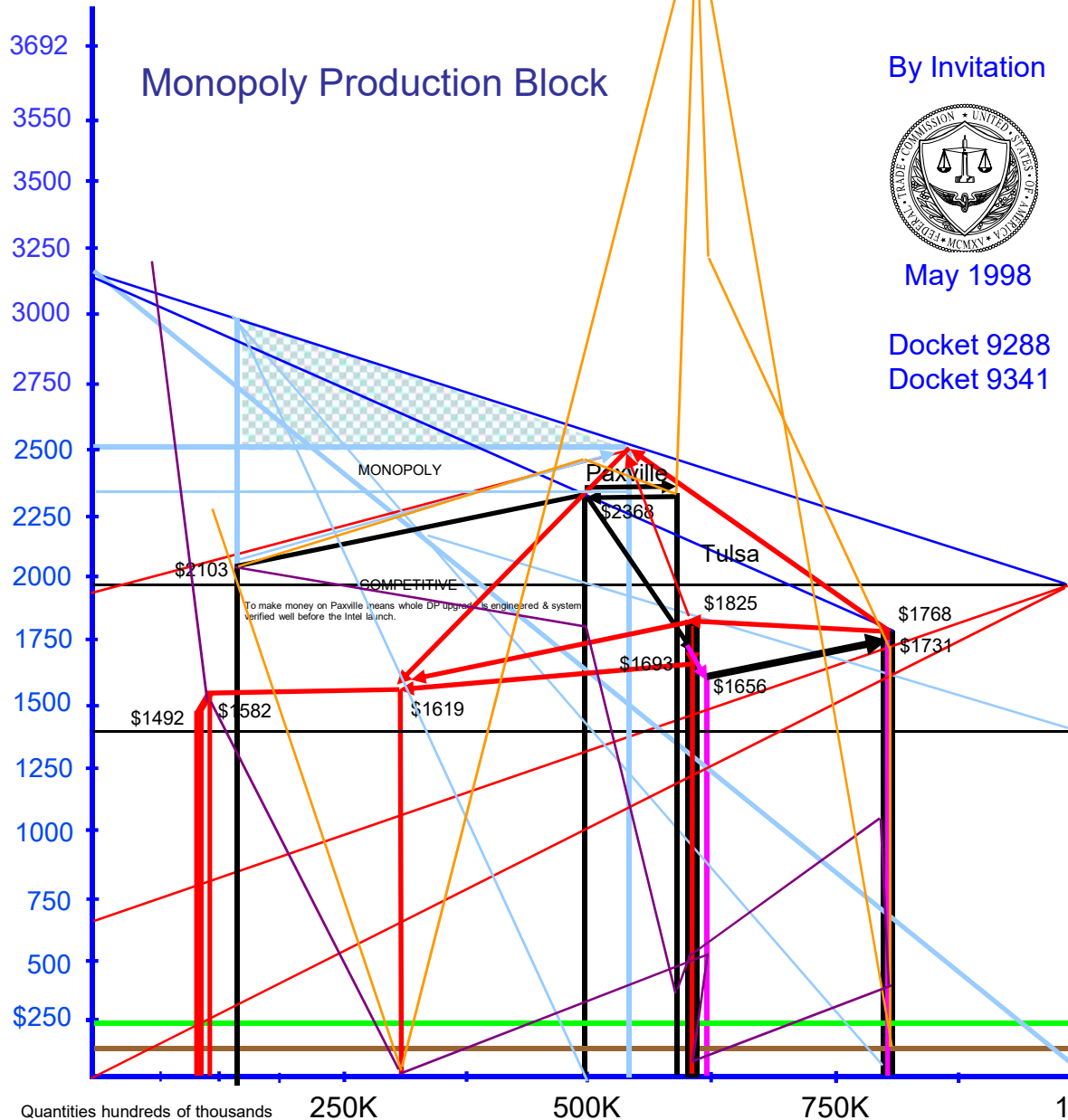
\$1K AWP = \$1993



TWIN CASTLE SCENARIO

ATC = \$259 - \$239

AFC = \$130 - \$122



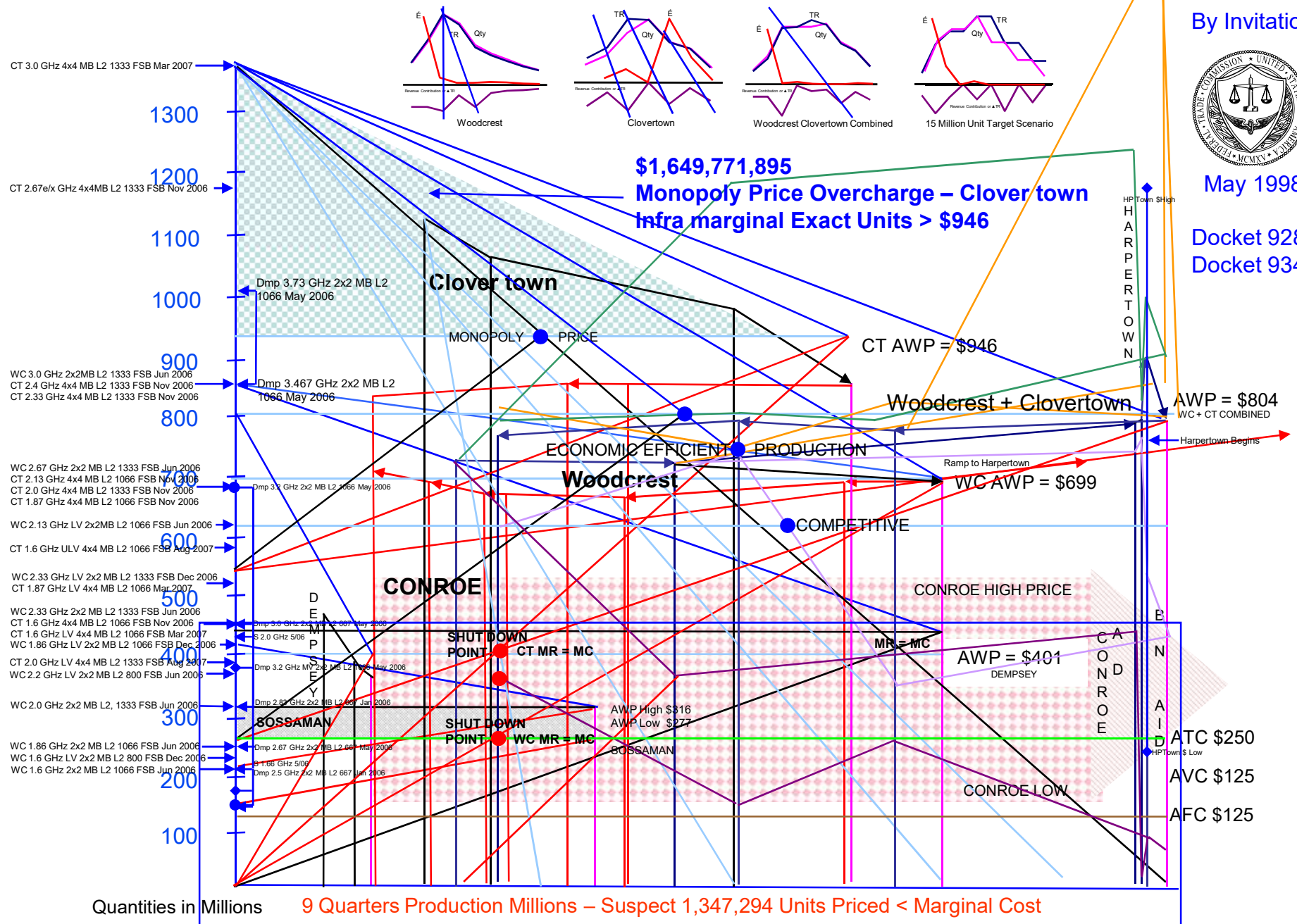
Camp Marketing Consultancy - Core 2 Xeon Clover town, Woodcrest, P4 Xeon Dempsey, P4M Sossaman Blade

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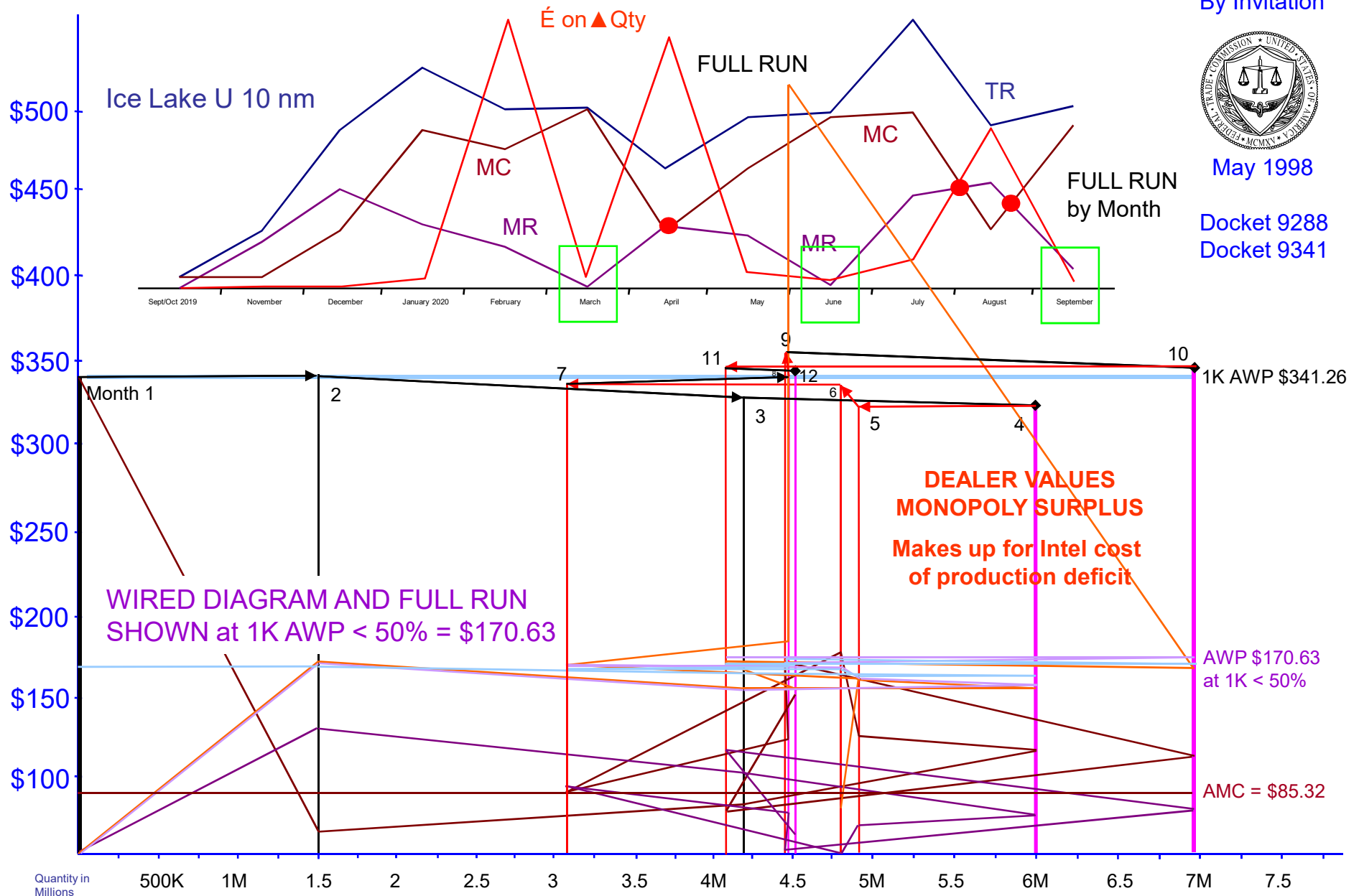
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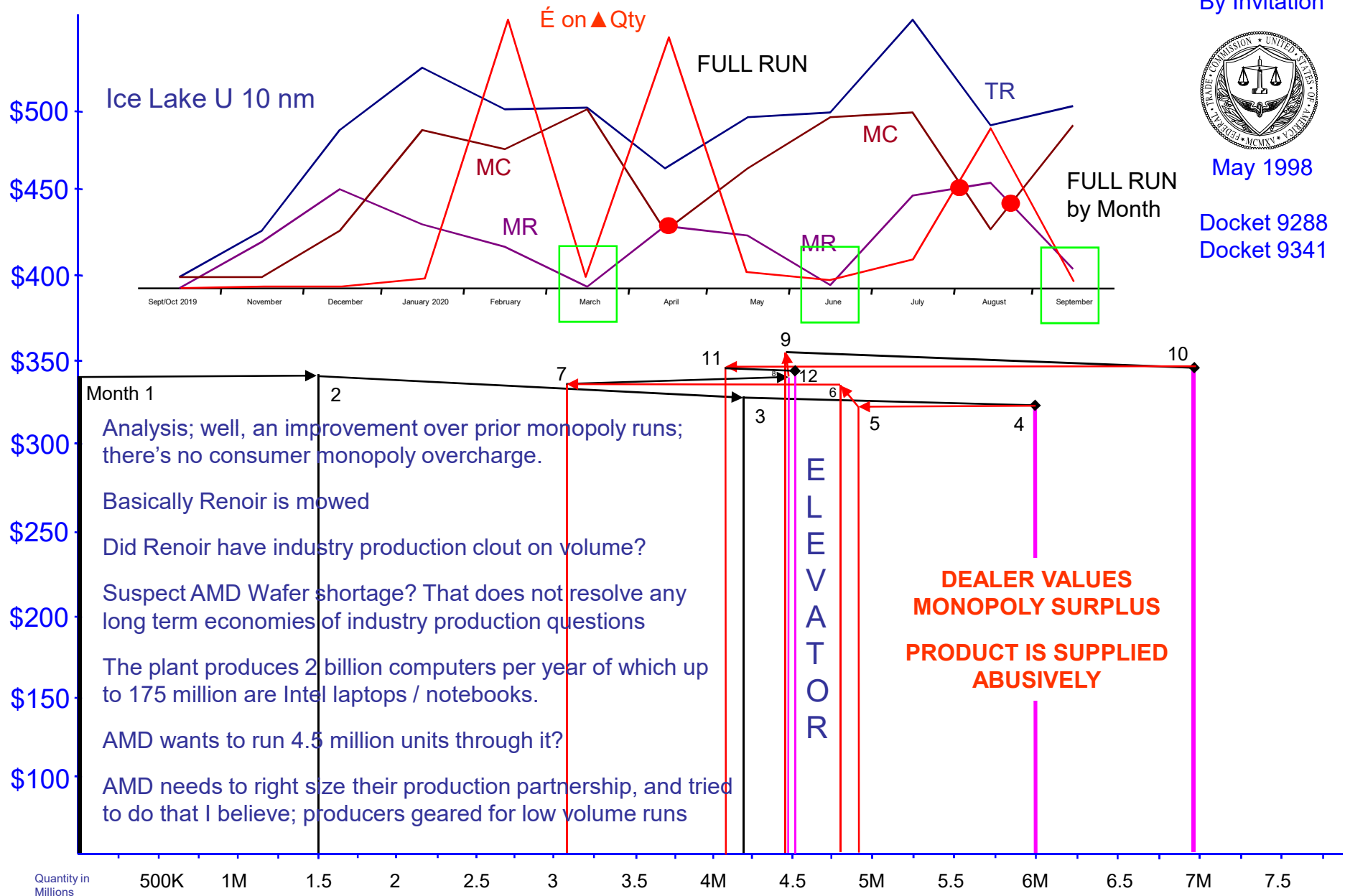
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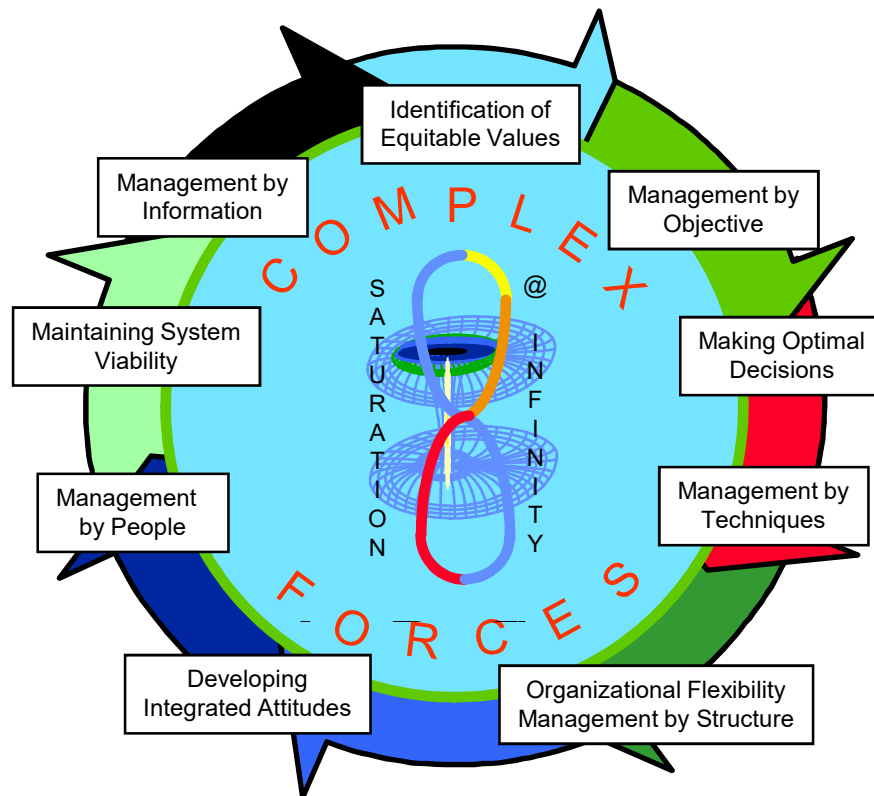


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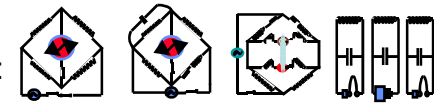
Camp Marketing Consulting



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.

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.