



В КРУГОВОРОТЕ ОБЛАКОВ

Развитие экосистемы решений для ЦОД и CSP

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ОБЗОР ДИНАМИКИ РЫНКА ОБЛАЧНЫХ УСЛУГ

ОБЗОР ИЗНУТРИ INTEL

ОБЗОР НОВЫХ ПРОГРАММ РАЗВИТИЯ БИЗНЕСА

2016

Digital Services Economy



**66% нагрузки на облачную
инфраструктуру идет от
потребительских сервисов**



2020

Integrated Digital Services Economy IoT, Big Data, and Enterprise



**К 2020... до 85% всех приложений
будет обеспечиваться облачной
инфраструктурой**

Source: Intel internal research, 451 Research

ДО \$1Т В НОВЫХ СЕРВИСАХ

К
2020



+ \$600В*
НОВЫХ
МОБИЛЬНЫХ
СЕРВИСОВ

\$530B in M2M
\$40B in sponsored data
\$30B in targeted ads
New mobile services innovation
Est. ARPU uplift: +\$2-4/mo



+ \$200В НОВЫХ
ОБЛАЧНЫХ
СЕРВИСОВ

\$130B in SaaS
\$40B in IaaS
\$30B in PaaS
Increasing revenue per
enterprise by 35% Est.



+ \$200В НОВЫХ
ВИДЕО
СЕРВИСОВ

\$150B in CDN, SLA, and Video Analytics
\$30B in rental/purchase
\$20B in subscription
Est. new cloud video ARPU: +\$11/mo
Est. new cloud DVR ARPU: +\$4/mo

* Source: Intel Corporation Cloud Services Analysis. Estimates Only. Extrapolated to 2020. Source: Intel, Ovum; new service definition - IP communication, Cloud, security, and trust, entertainment, mobile commerce and payment, ad and big data, m2m, iot, smart home, verticals in connected car, transportation, retail, utility, education, healthcare and smart cities; Cisco SP MOI

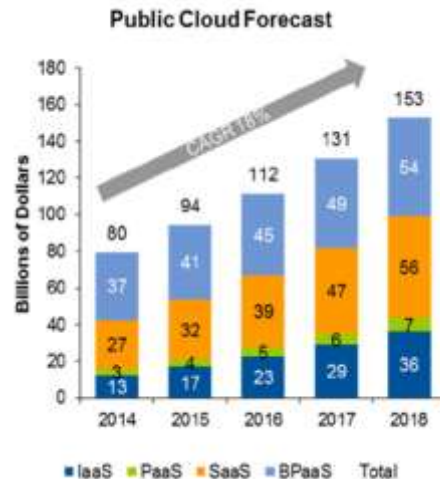
ОБЛАКА & ГИБРИДНЫЕ ОБЛАКА РАСТУТ

CLOUD USAGE: РАННЕЕ БОЛЬШИНСТВО

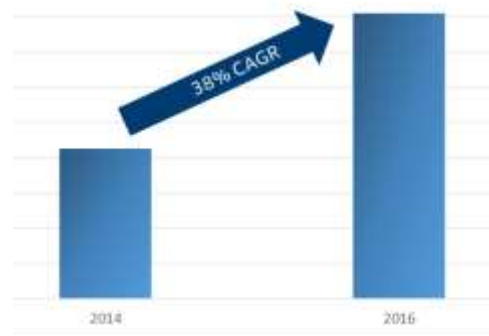
50% ВСЕХ ПРЕДПРИЯТИЙ БУДУТ ИМЕТЬ ГИБРИДНУЮ
СРЕДУ К 2017 – GARTNER

+\$10 МЛРД БИЗНЕСА ДЛЯ СЕРВИС-ПРОВАЙДЕРОВ

Source: Intel internal research, 2016
Gartner 2015, 332 Respondants



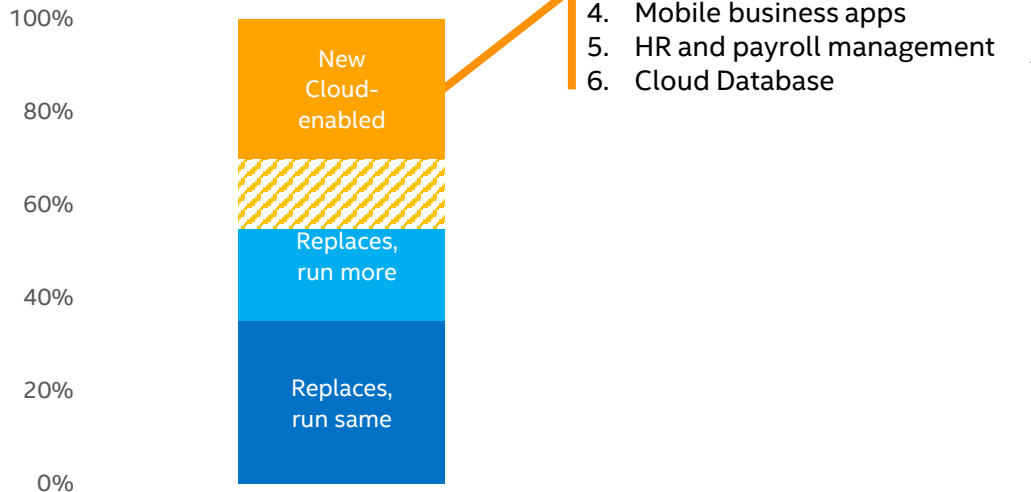
Number of Corporations Hosting both
On-Prem and Off-Prem Domains



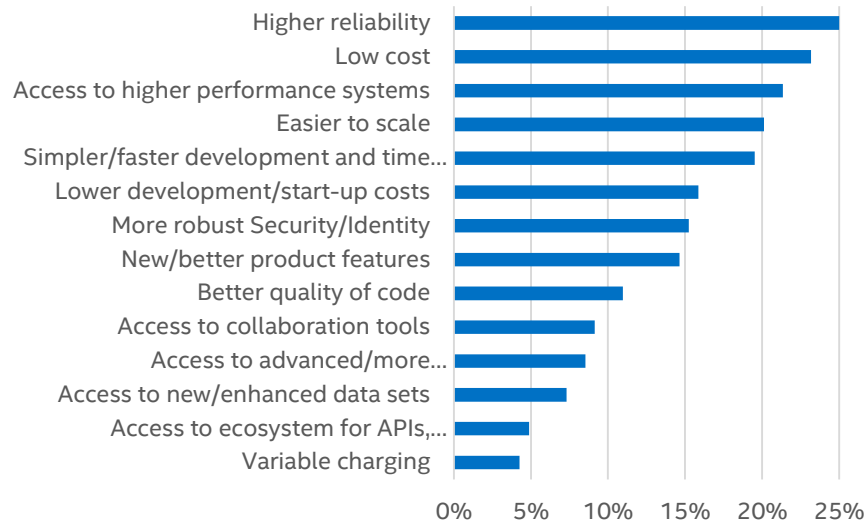
НОВАЯ ЧИСТАЯ ПРИБЫЛЬ

~45% ПУБЛИЧНЫХ IAAS/PAAS УСЛУГ – НОВЫЕ ВНЕДРЕНИЯ

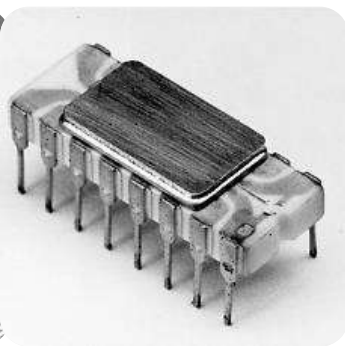
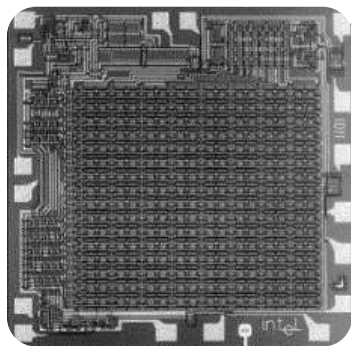
Public Cloud siphoning on-premise infrastructure



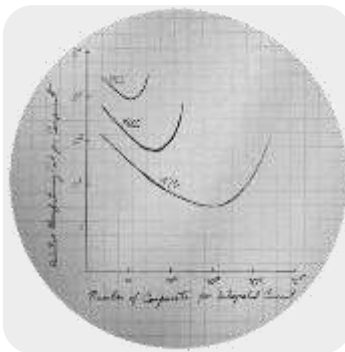
Public cloud drivers of new workloads



Source: Intel internal research, Bain, 2016



ВНУТРИ ОБЛАЧНОГО КРУГОВОРОТА



ОБЛАЧНАЯ СТРАТЕГИЯ INTEL

Hyperscale



Deliver the best performance / Total Cost of Ownership (TCO)

Cloud Industry



Deliver differentiated services at hyperscale economics

Private Enterprise



Enable business innovation through cloud transition

1

Innovate advanced data center technologies for cloud workloads

2

Make 'Software Defined Infrastructure' efficient and easy to deploy

3

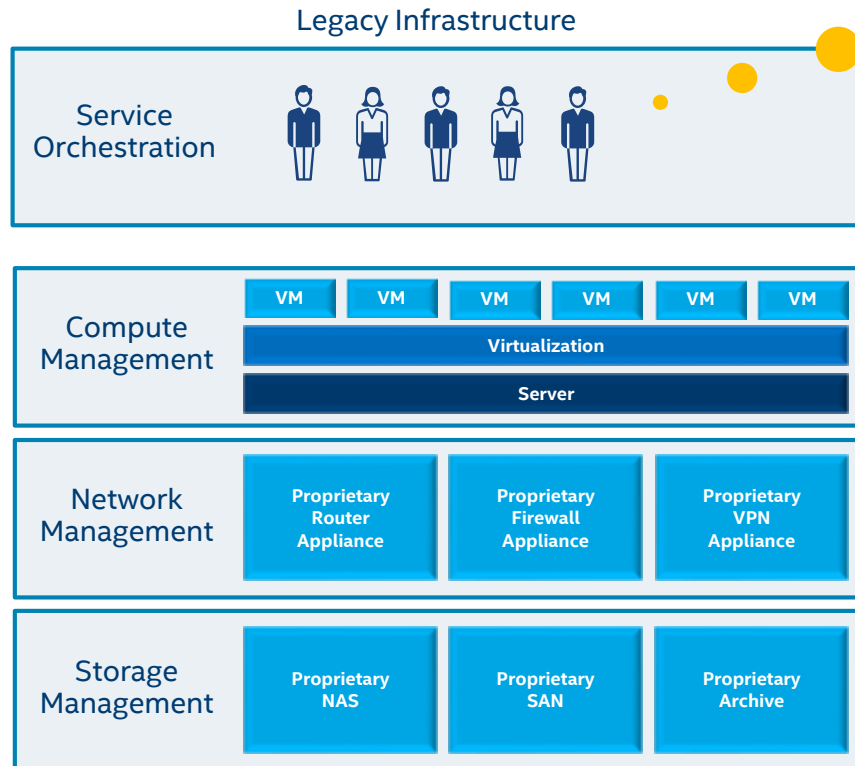
Break down barriers for broad scale adoption

ПРОБЛЕМНЫЕ ЗОНЫ ОБЛАЧНОЙ ИНФРАСТРУКТУРЫ

CLOUD SERVICE PROVIDERS IN THE MIDST OF THE VORTEX

The imperative to scale up
but maintain SLAs in face of
shifting customer demands
while optimizing cost of
service delivery

Disparate
Management
tools drive up
cost and
complexity



Manual
Orchestration
and Service
allocation
does not scale

Lack of
transparency
to
infrastructure
utilization

Fierce
competition
from
commodity
cloud
providers

СБАЛАНСИРОВАННЫЕ ИНВЕСТИЦИИ В ЦОД

COMPUTE

Intel® Xeon®
Processor Family



Intel® Connectivity
Solutions



NETWORK

Intel Storage Solutions

Intel® NVMe and 3DXP
Solid-State Drives

Tiered Intelligence Software

STORAGE



ПРОГРАММЫ ДЛЯ ПРОИЗВОДИТЕЛЕЙ И ИНТЕГРАТОРОВ

INTEL® NETWORK BUILDERS

Fostering a vibrant ecosystem to lead the network transformation of tomorrow

INTEL® CLOUD BUILDERS

Accelerating optimized software-defined infrastructure deployments

INTEL® STORAGE BUILDERS

Accelerating the next generation of storage innovation

КОНКУРЕНТОСПОСОБНЫЕ ОБЛАЧНЫЕ СЕРВИСЫ = УЛЬТРАСОВРЕМЕННЫЙ ЦОД

Development

Compute-Storage-Network Pooled and on-Demand | Advanced Development Tools Library
Data Center is the Target System | Security is Built-in | Real-time Compile & Run Feedback

Operations

Automated App Control
Automated Provisioning
Automated Break-Fix
Automated Routing
Automated Maintenance

Capital

\$10/Watt World-Class
Capital Build-out Cost*
Capital Re-use Cycle

OpEx

1.05 PUE World-Class Power
Utilization Efficiency*
1 Technician per x,000 servers

Server Equipment

Rack Level Procurement
Integrated SW + HW
Integrated Networking
Automated Rack Control
Automated Pod Control
Automated DC Control
15KW-25KW per Rack



1. Intel Corporation estimation on the Future of Cloud Data Centers
2. Leading IPDC practices, 2016

COMPETITIVE CLOUD SERVICES = STATE-OF-THE-ART DATA CENTERS

Developers have tools that design the App with Integrated Data Center Resources

Fully Automated Data Center Operations

"Data Center OS"
MW + Server OS

Building out an Agile Cloud Infrastructure



Within 3 Years →

1. 2x Compute ½ Density
2. Beginning of New Memory & Storage systems structure
3. 25/40/100GbE
4. Scale & Hyperscale – Modularized, pooled systems with integrated data center mgmt

Next Generation Facility Design & Retrofits

Capital Build-out Cost*
Capital Re-use Cycle

Utilization Efficiency*
1 Technician per x,000 servers

Software Defined Infrastructure
combined with
Advanced Server Technologies
with a

Practice of Continual Modernization

Intel Confidential

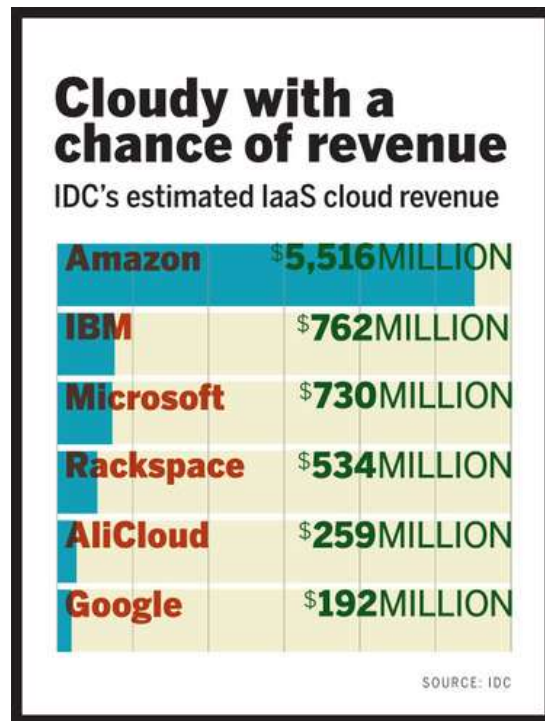
COMPETING IN THE VORTEX, KEY DIFFERENTIATORS FOR CSPs

► Sell *your* own story.

There's real value in being your own company, standing-up value in every corner of the business.

► Show *you're* price competitive.

Small does not necessarily mean more costly, especially the TCO equation.



Source: **Network World**, By Brandon Butler Jul 11, 2016
http://www.networkworld.com/article/3094033/cloud-computing/who-s-behind-amazon-in-iaas-cloud-revenue-not-microsoft.html#tk.rss_cloudcomputing
Business differentiation adapted from
<http://www.usatoday.com/story/money/columnist/abrams/2016/08/03/rhonda-abrams-how-out-amazon-amazon/86099312/>

► Create the *best experience*.

Shopping for better cloud services is a risky task, take the risk out.

► Develop *loyal* customers.

Concentrate on ways to increase engagement value with customers. Typically enterprises have one *primary* cloud provider.

► Team up with others.

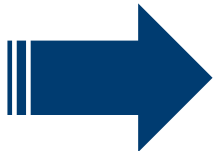
There is credibility and strength in common collaborators and industry value-drivers.

ПРОВАЙДЕРЫ ОБЛАЧНЫХ СЕРВИСОВ И INTEL

Top 7

Amazon
Google
Facebook
Microsoft/Azure
Alibaba
Baidu
Tencent

Hyperscale &
Open source
Innovation



Scale Technology & Business Value

Next Wave

Comms Cloud

INTEL® CLOUD INSIDER PROGRAM

An exclusive membership program that provides business and technology value to you and your customers.

INTEL® TECHNOLOGY PARTNERS

Local experts working for your success



Technology
Provider
Platinum 2016

Cloud Data Center Specialist

2H 2016 Tiering

ПРЕДСТАВЛЯЕМ ПРОГРАММУ INTEL® CLOUD INSIDER

An invitation to **Cloud Service Providers** to join an exclusive membership program that provides business and technology value to you and your customers. The Intel® Cloud Insider Program offers business and technology insights and blueprints, new technology enablement, cloud-focused community & connections, and marketing & selling tools that help increase expertise with a focus on improving revenue.



Intel Technology &
Product Insight and
Solutions



Ecosystem Solutions



Industry Insight

INTEL® CLOUD INSIDER PROGRAM

Delivering Exclusive Benefits to CSPs:

- Expedite adoption of new cloud products & technologies
- Increase expertise, understand trends, gain new insights
- Optimize cloud services for better customer experience
- Build the value of their company with the strength of Intel brand



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ПРЕИМУЩЕСТВА ПРОГРАММЫ



ТЕХНОЛОГИИ И РЕШЕНИЯ

Solution Blueprints

- ✓ Compute Model
- ✓ Security
- ✓ Storage
- ✓ Network
- ✓ Media Delivery
- ✓ Cloud Analytics

■ Case Studies



ОБУЧЕНИЕ И МЕРОПРИЯТИЯ

- Insights into New Technology
- Industry Trends & Analytics Reports
- Cloud Services Market Research
- Information on Forthcoming Events

Facilitates Adoption of New Technologies

ПРЕИМУЩЕСТВА ПРОГРАММЫ



ПРОГРАММНОЕ ОБЕСПЕЧЕНИЕ И SDK

- Cloud Software Subsidized or Free of Charge
- Software Development Kit Support
- Optimization Support



ОНЛАЙН СООБЩЕСТВО

- Member's Online Community
- Blogs by Intel and Cloud Industry Experts
- Best Known Methods

Connects CSPs to Value-Added Resources

ПРЕИМУЩЕСТВА ПРОГРАММЫ



ПОНИМАНИЕ ОТРАСЛИ

- Webinars from subject matter experts on new technologies and opportunities
- Analysis from leading research firms



КО-МАРКЕТИНГ

- Cloud Finder and SEM showcase CSPs and helps drive traffic to CSP sites
- Xeon co-branding program with instructions and co-branding assets

Helps CSPs Identify Opportunities and Market the Benefits of 'Intel Inside® Brand'

INTEL® TECHNOLOGY PROVIDER

НОВАЯ ВОЗМОЖНОСТЬ ДЛЯ PLATINUM-LEVEL: СПЕЦИАЛИЗАЦИЯ CLOUD DATA CENTER



Cloud Data Center Specialist

Introducing the Intel® Technology Provider Segment Specialist Program.

The new **Segment Specialist Program** represents the pinnacle of subject matter expertise and becomes the go-to channel for sales and marketing collaboration in a given vertical or segment.

“Cloud Specialty” Benefits are designed to elevate and support the top channel partners who demonstrate excellence in building and deploying cloud solutions.

As Intel's top tier of Intel® Technology Provider membership, Platinum-level members are invited to consider and qualify for the Cloud Specialty.

INTEL® TECHNOLOGY PROVIDER

ДОПОЛНИТЕЛЬНЫЕ ПРЕИМУЩЕСТВА СПЕЦИАЛИЗАЦИИ CLOUD DATA CENTER



Access to Cloud Experts



Additional points offers for Cloud Specialists



“Cloud Data Center Specialist” designation



Customer matchmaking



Intel Cloud Resources



Facilitated qualification for Intel's Cloud Builder Program



Marketing promotion of Cloud Specialists



Priority invitation to industry events and training sessions

УСКОРЯЯ КОНТИНУУМ ОБЛАЧНЫХ СРЕД

INTEL® CLOUD
INSIDER PROGRAM

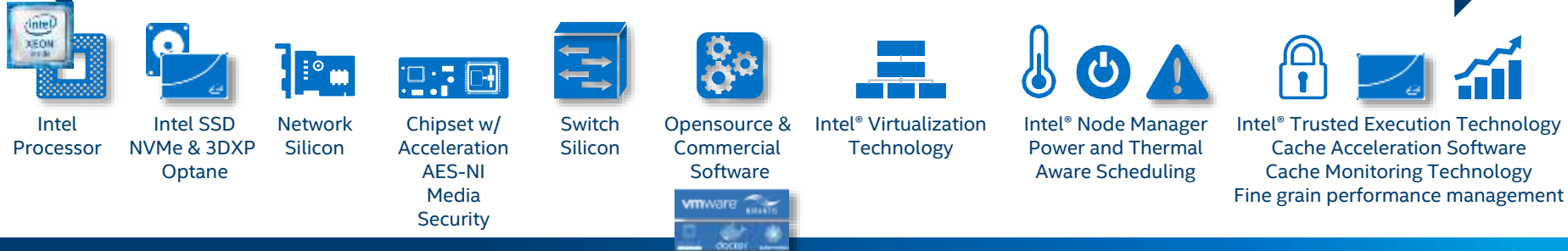
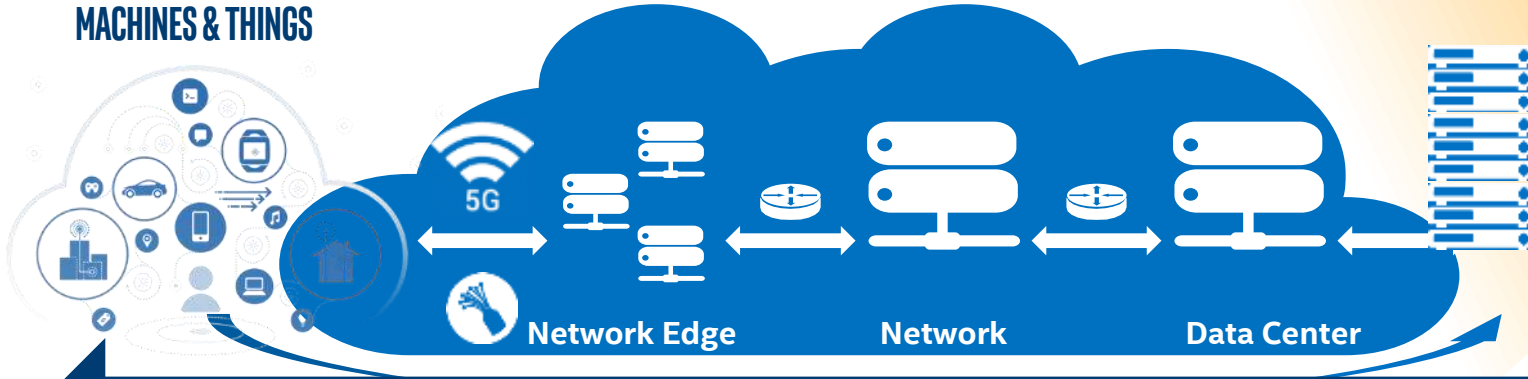
DIGITAL TRANSFORMATION
MACHINES & THINGS

INFRASTRUCTURE TRANSFORMATION

CLOUD SERVICES



Cloud Data Center Specialist



INTEL® CLOUD INSIDER PROGRAM

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TECHNOLOGIES**



**EDUCATION
& EVENTS**



**SOFTWARE
& TOOLS**



**INDUSTRY
INSIGHT**



**ONLINE
COMMUNITY**



**JOINT
MARKETING**

THANK-YOU

