

The Future Runs on System z ... And The Future Begins Today!

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Business Opportunities and IT Challenges Today

Globalization

*Global 24x7 demand for information services:
Always on*

Scale

*On demand resource gathering:
The right size when needed*

Complexity

*Service Oriented Architecture:
Simplify your heterogeneous world*

Security

*Protect your assets and your customers:
Security by design*

Environment

*Power efficiency and site optimization:
Go Green*



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The System z answer

Traditional Benefits

Highest availability in the market

Highest security in the market

System management

Workload Management

Extreme Scalability

Investment Protection

New Benefits

Capacity OnDemand upgrades

Granularity

Service Oriented Architecture

Linux, Java, XML: Specialty Engines

Enterprise Data Hub

Server Consolidation

Energy efficiency

Cell (Gameframe)

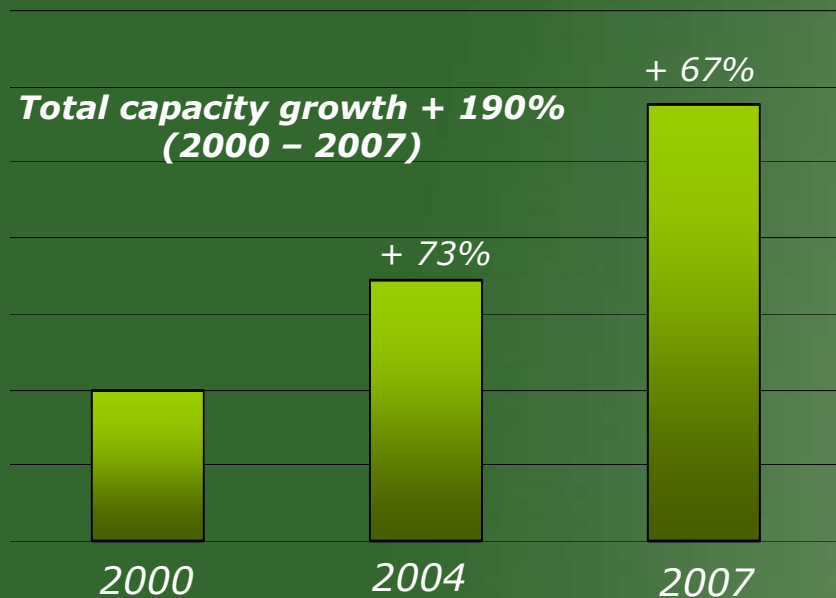


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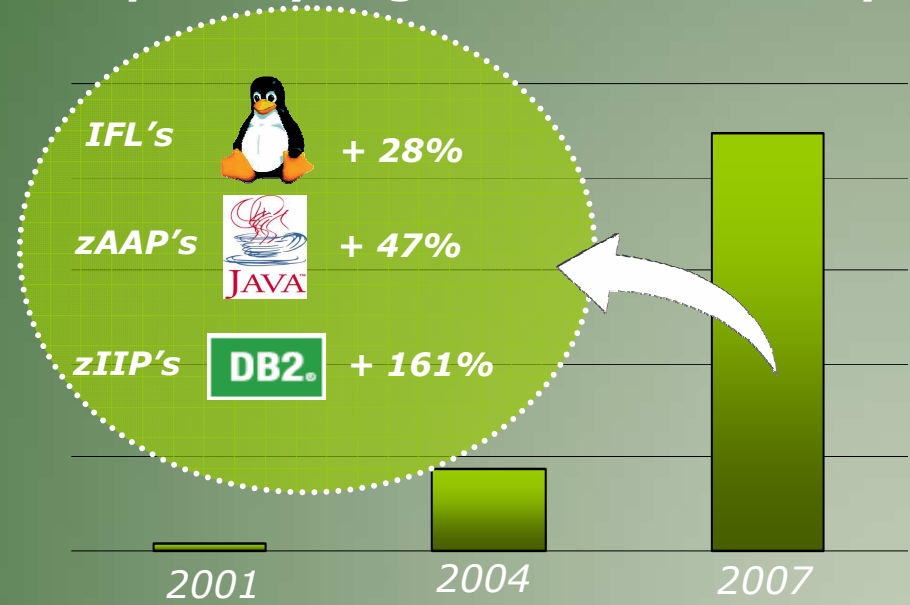
Mainframe market status

- ❑ *Since 2000, IBM's System z marketshare nearly doubled* (source IDC)
- ❑ *3Q'00 to 3Q'07, System z grew marketshare from 17% to 32% globally* (source IDC)
- ❑ *Installed capacity of specialty engine are driving new workloads*

System z total inventory



Specialty engines total inventory



Source: IBM Finance

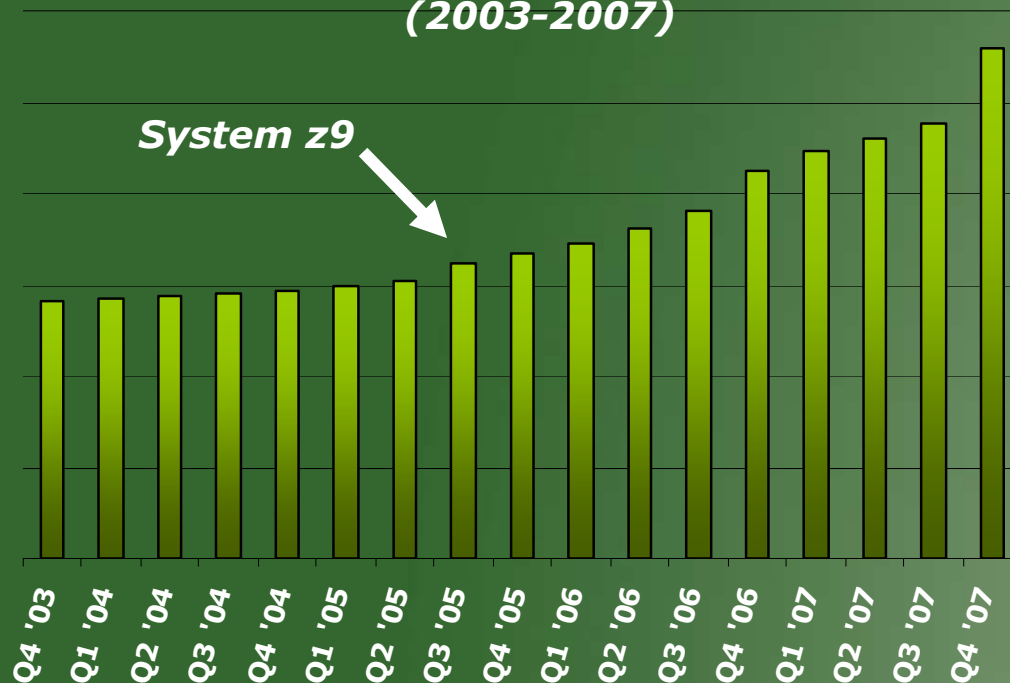


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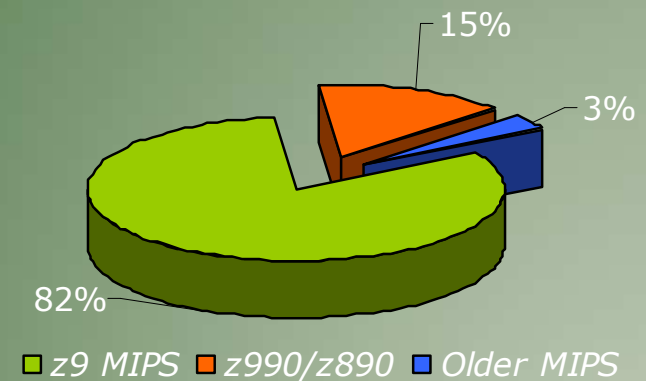
Mainframe growth in Italy

- System z technology adoption always growing - Capacity nearly doubled (4Q '03 to 4Q'07)
- System z9 as trigger for Mainframe workload growth

System z capacity growth in Italy
(2003-2007)



System z Technology adoption in Italy (4Q '07)



Source: IBM Italy

Growth supported by specialty engines



The Future Runs on System z

The IBM Commitment

August 2003

The Mainframe Charter

IBM's long-term plan and commitment to the System z platform.



Lead through **innovation** to support increasingly integrated, flexible business processes for the On Demand Business.



Enhance the **value** proposition and lower the cost of mainframe computing solutions in a way that is compelling, clear, and consistent.



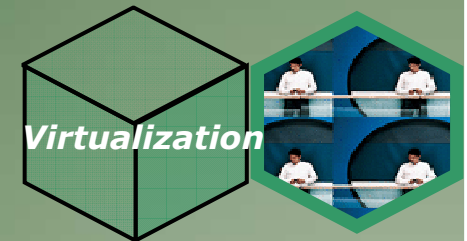
Support programs to foster vitality in the mainframe **community**, helping to promote a strong application portfolio, greater access to skills, and world-class support services.

July 2005

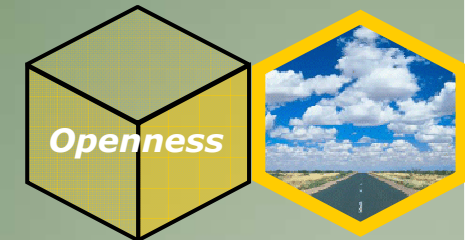
The Systems Agenda

IBM's Strategic commitment towards the market and the entire ecosystem

Optimize IT operations and dynamically respond to the priorities of the business by managing the IT environment more efficiently with proven IBM cross-platform **virtualization capabilities**.



IBM is committed to **sharing technology** with the industry and providing the industry's richest portfolio of interoperable server and storage systems.



Working together with clients and IBM Business Partners, IBM provides the breadth of expertise and resources to design, build and implement IT solutions that can drive innovation and help transform your business.



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New Investments

Technology

- ❑ **2003-2008: \$1.5 billion investment in 5 years to develop latest technology** with a global team of more than 5,000 technical professionals
- ❑ **Oct 2006: IBM announced a 5-year, \$100 million investment for System administration simplification**



Skills

- ❑ **Academic Initiative - Over 400 Universities and more than 45,000 students**



Solutions

- ❑ **Over 4,000 applications – up 600 in 2007**
- ❑ **Over 1,100 Linux applications – up 260 in 2007**
- ❑ **Over 1,200 ISVs – up 67 in 2007**



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Academic Initiatives in Italy

Sapienza Università di Roma



- ❑ 2006/2007 – Seminar - First level degree - 70 students
- ❑ 2007/2008 - Full formal course 12 x 2 hours + 12 x 2 hours labs - 25 students

Università di Catania



- ❑ 2005/2006 – Science of Information – Full formal course - 170 students.
- ❑ 2006/2007 – Full formal course 12 x 2 hours - 120 students
- ❑ 2007/2008 – Full formal course planned – 60 students.

Politecnico di Bari



- ❑ 2005/2006 – Engineering and Electronics - Seminar - 90 students

Università di Palermo



- ❑ 2005/2006 – Institute of Engineering – Full formal course – Master degree – 70 students
- ❑ 2006/2007 – Institute of Engineering – Full formal course – Master degree – 96 students
- ❑ 2007/2008 – Institute of Engineering – Full formal course – Master degree – 50 students

Seconda Università di Napoli



- ❑ 2006/2007 – Seminar - First level degree - 25 students

Università Cagliari



- ❑ 2006/2007 - Computer Science – Full formal course 8 x 3 hours - 91 students



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IBM Destination z

IBM

**Academic
Institutions**

ISVs



**Business
Partners**

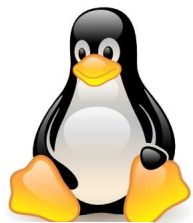
Systems Integrators

www.ibm.com/servers/destinationz



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zEcosystem: some outcome



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STONESOFT



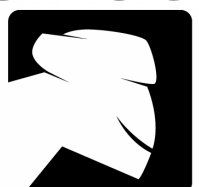
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EVERY SECOND. EVERY DAY.

INTOR
be enterprising

workbrain



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zEcosystem



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IBM System z10 - The Future Begins Today

- CPU intensive workloads
- Consolidate More Servers
- Better specialized workloads
- Faster Batch



- Just in time deployment of capacity
- The right mix of different workloads



- Previously unfathomable workloads on mainframes



- Improved performance for business and financial applications
- Java and C/C++ exploitation



- Highest scalability on the market
- Data centers in a Box



- Green – Energy efficiency



- Best Virtualization Solution
- Just the size needed



New Business Opportunities with IBM System z10

Banks and Financial institutions

- Traditional CORE banking applications:

Improved **Security**, Enhanced **Availability**, **Scalability** and **capacity** to support business growth.

- New workload for banking:

Improved execution of **processor intensive** workloads; Up to **10X** improvement in decimal arithmetic: probability and statistics; **Payments** solutions (e.g. ACI Base24, eFunds); **Risk management** solutions (e.g. iFlex);

Data Proximity!

Public Sector (central and local)

- Traditional CORE Public sector applications:

Improved **massive data management**, Improved **Flexibility** through ondemand resources, Improved **Security**.

- New Public Sector imperatives:

Savings: z10 allows energy Savings vs previous technologies; Server **consolidation** allows up to 80% energy consumption and SW licences costs (better TCO);

eGovernment and **Data availability** (24x7): Online seasonal services; **Share** services for increased efficiency: Optimize existing services;

Investments protection: Rational tools to renew existing applications



New Business Opportunities with IBM System z10

Distribution Sector enterprises

- *New Distribution challenges:*

Data as competitive advantage: Improved execution of **processor intensive** workloads together with DB2 enhancements in **Business Intelligence**;

Collaboration and partnership within same enterprise and in the supply chain improved with System z10 **dynamic resource sharing**.

Manage more effectively the seasonal needs through the "Just in time" **on demand resources deployment**.

Communication Sector enterprises

- *New Communication challenges:*

Breakthrough **performance**, extreme **efficiency**, **low cost virtualization** and unmatched **security**; Costs reduction through **simplified IT management**, reduced data center requirements and **savings in software licensing**;

VOIP, Online Gaming, Java, Linux: Openness is granted!

Industrial Sector enterprises

- *Industrial sector enterprises main challenges:*

Managing enterprise **resources** effectively. ERP (as **SAP**) have been optimized for running with DB2 on System z10.

Specialty engines (zIIP) grant the **best TCO** for DB Machine with all System z characteristics.



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