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# Mega Trends

of ITDMs say enabling "anywhere work" is a high priority during the next 12 months

of end-users believe that Al tools will increase productivity "significantly" increase productivity









Digital equality is a pain point in hybrid work

of current meetings are mixed remote/in-person4

70%

is the average CPU & memory utilization; growing from 50%

More Power Is Needed

More Devices Are Used

devices across multiple workspaces, making transitions challenging<sup>1</sup>

Security & manageability are top priorities



of ITDMs say the greatest weakness is the potential of hybrid employees to be compromised<sup>4</sup>

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# In 2025, we believe in

Cautiously Optimistic

**External Dynamics** 



**Strong Momentum** 

Business Spend on IT





**Transformational Force** 

Artificial Intelligence



Easing inflation & interest rate cuts
Post-election political stability
Continued global conflicts & climate change

400M+ old PCs: Win 10 EOL & aged EDU refresh Accelerated hybrid work demands New AI PC demand - Improved Performance New Experiences: Transcription, Text to Video New Silicon: ARM, Intel / AMD NPU, GPUs New Apps & Services: Co-pilot, Al assistants

Source: MAP Mar-24 PC Market Outlook

Source: IDC Blackbook & Gartner, Devices: Printers, phones, desktops, laptops & tablets, NB PC Rev MAP March 24 (; Old PCs:≥ 4 years

Source: MAP AI Impact on PC Market (Mar 24)+ estimations



# Alis changing the way humans interact with computing

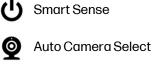


# We already use Al every day to make life easier and better



#### HP Al-driven PCs & experiences available today









Intelligent Hibernate



# Al simplified



#### Generative Al

Using raw data to generate content, creating images, music, speech, code, video or text

#### **Examples:**

Content Generation: Chat GPT, Image Generation: Dall-e

#### Deep learning

Processes complex and nuanced data by learning on its own

#### **Examples:**

Alexa, Google Nest, driverless vehicles: Tesla, Facial Recognition: Windows Hello

#### Machine learning

Intelligent data-based decision making with the help of human training

#### **Examples:**

Streaming suggestions: Netflix, Traffic Predictions: Google Maps, Waze

## Artificial Intelligence is

Radically

re-shaping

the world around us

#### Chip Makers

New silicon

#### Markets

- Increase in TAM
- Accelerated PC refresh cycles

#### Industries

- Smart manufacturing
- Accelerated development

#### Everyday Life

 Simplifying life with instant access to curated information to make better decisions at work, school, healthcare and home

#### Technology

• Elevated PC designs

#### Power

- Better performance
- Increased efficiency

#### The Planet

 Improved research Reliable weather forecasting



# Raise the bar with on-device Al inferencing

#### Made possible with next-gen AIPCs









Accelerate Speed

On device processing faster than cloud

Power & Cost Efficient

Low power use with NPU; Less dependent on cloud subscriptions Secure & Private

Using Al locally **keeps** sensitive data private

**Untethered Access** 

Leverage the power of Al locally, without Internet



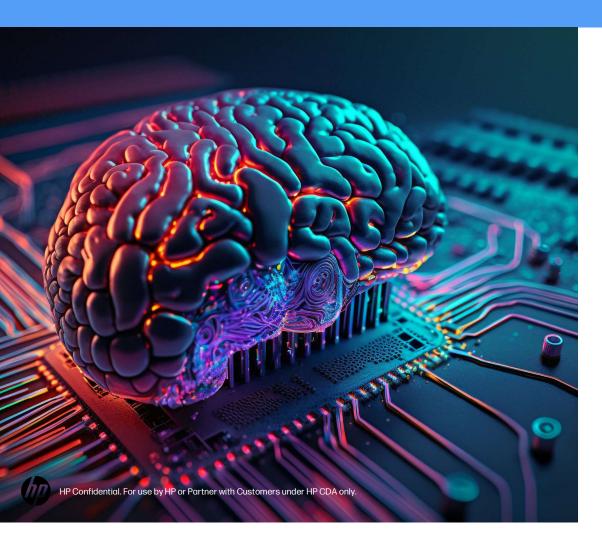


# Al driving new accelerators

CPU Central Processing Unit	GPU Graphics Processing Unit	NPU Neural Processing Unit	VPU Vision Processing Unit
<ul><li>Smaller number of cores</li><li>Broad compute capabilities</li><li>Optimized for different tasks in parallel</li></ul>	<ul> <li>Large number of cores</li> <li>Optimized for performing specialized math very quickly</li> <li>Sometimes integrated with CPU, sometimes discrete</li> </ul>	<ul> <li>Large number of Al cores</li> <li>Specialized derivative of GPU further optimized for neural networks and Al</li> </ul>	<ul> <li>Large number of visual Al cores</li> <li>Another derivative of GPU optimized specifically for image processing and image recognition</li> </ul>
<ul> <li>Runs OS and applications</li> <li>Gets many different processes done quickly</li> </ul>	<ul> <li>Originally developed to accelerate 3D graphics</li> <li>Already adapted for use in Al workloads</li> </ul>	<ul> <li>Can be up to 10,000X faster than CPU for Al workloads</li> <li>Allows CPU and GPU to perform optimally on their dedicated tasks by offloading Al processing</li> </ul>	<ul> <li>Even faster than NPU for Al workloads involving images and video</li> <li>Optimized for high performance per watt, versus GPU which is optimized for absolute performance</li> </ul>



## Why TOPS matter?



**Tops 101** 

TOPS is an acronym for
Tera Operations Per Second,
which is a measure of
the computational speed of an
NPU (Neural Processing Unit),
a specialized hardware device
for performing neural network
operations.

The higher the TOPs, the faster the response, the better the experience

# AIPC today

- Any NPU
- Copilot Key<sup>11</sup>



# Next-Gen AIPC1

- 40-60 TOPS NPU<sup>49</sup>
- Purpose-built for knowledge creators to do more with local Al
- Meets Microsoft
   Copilot+ PC standards<sup>96</sup>

Al PCs today have been defined by IDC<sup>56</sup> as any PC with a CPU, GPU and an NPU with less than 40 TOPS.

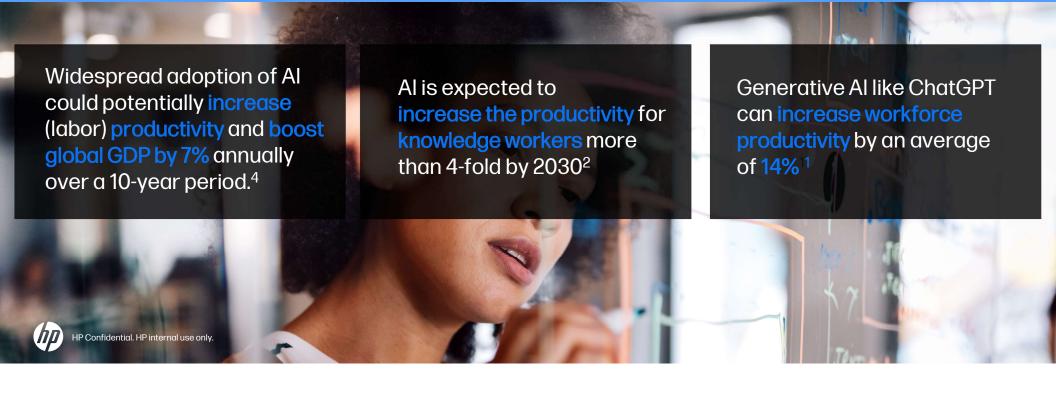


# Companies are gearing up for the future

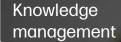


# Al promises to accelerate productivity for knowledge workers

by optimizing workflows and allowing employees to concentrate on more strategic, value-added tasks.



# How Al empowers work





Find what you need when you need it

Translation



Enable real-time translations

Innovation & Creativity



Spark creativity and approach problems in different ways





Get up-to-speed faster

#### **Automation**



Reduce time on mundane and repetitive tasks

#### Prediction



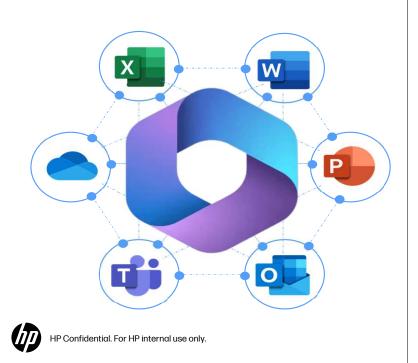
Identify patterns and detect trends



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# Microsoft 365 Copilot<sup>1</sup> delivers a whole new way to work

An application using modern AI to assist you with complex cognitive tasks





Focused on uninterrupted workflows

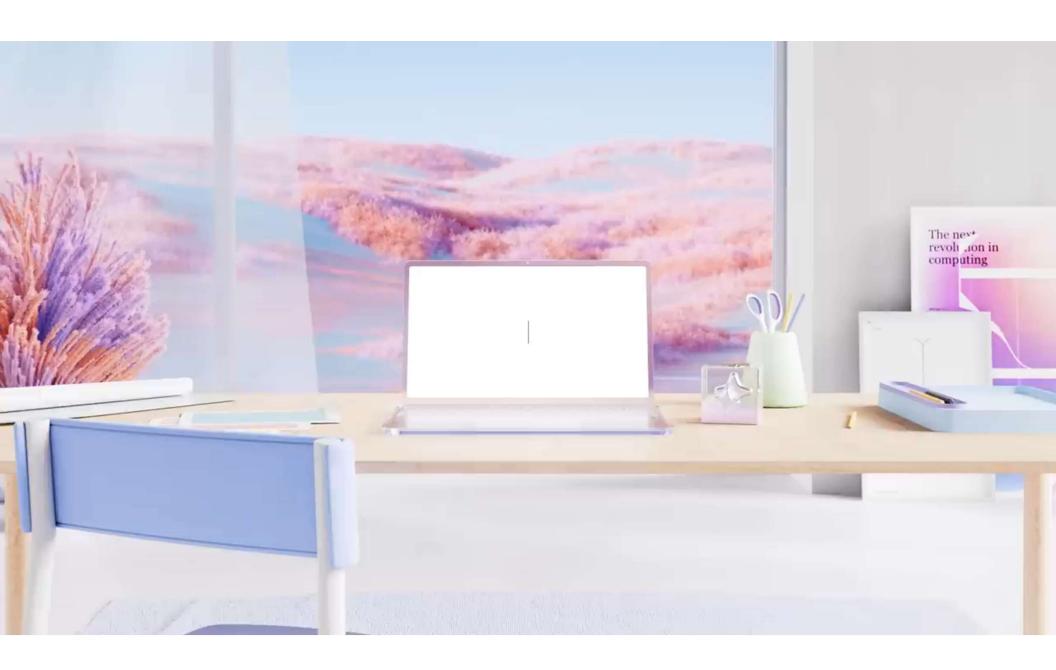


**Extended functionality from plug-ins** that add **new knowledge** and **new actions** 



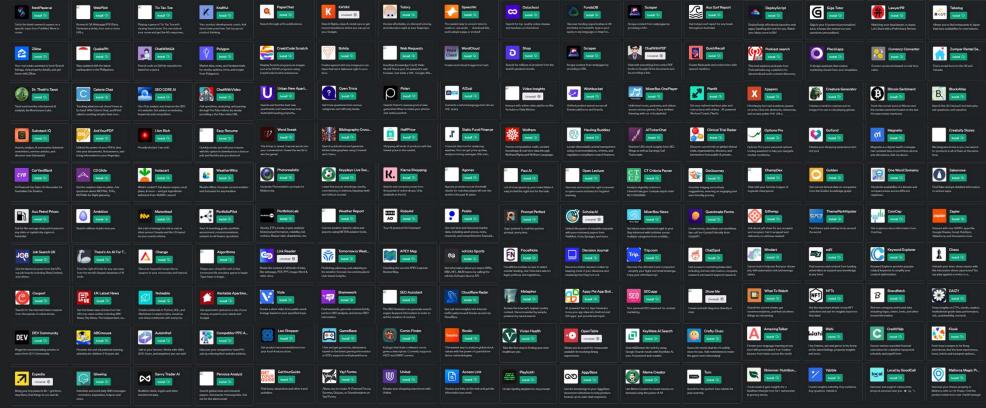
Always present "where you work"

Augmenting the user experience with integrated Al to assist work.



## Here come the Copilot Plugins ...

# Developing ... at a rapid ... pace





## ISVs focus using NPU





DEEP RENDER



















With Al-acceleration built into every processor, you now have access to a variety of experiences – enhanced collaboration, productivity, and creativity—right at your desktop, without having to rely on help from a distant server. Use Alaccelerated ISV features locally.

#### **CPU-Fast response**

You can rely on the central processor for smaller workloads at low latency.

#### **GPU-High throughput**

The graphics processing unit is ideal for large workloads that require parallel throughput.

#### NPU-Power efficiency

The neural processing unit handles sustained, heavily used Al workloads at low power for greater efficiency.



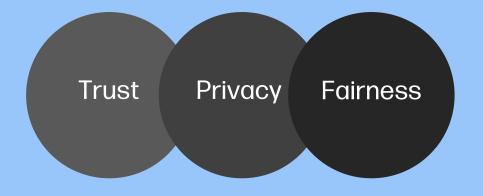
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# Building Al Responsibly

#### "Value and Policies"

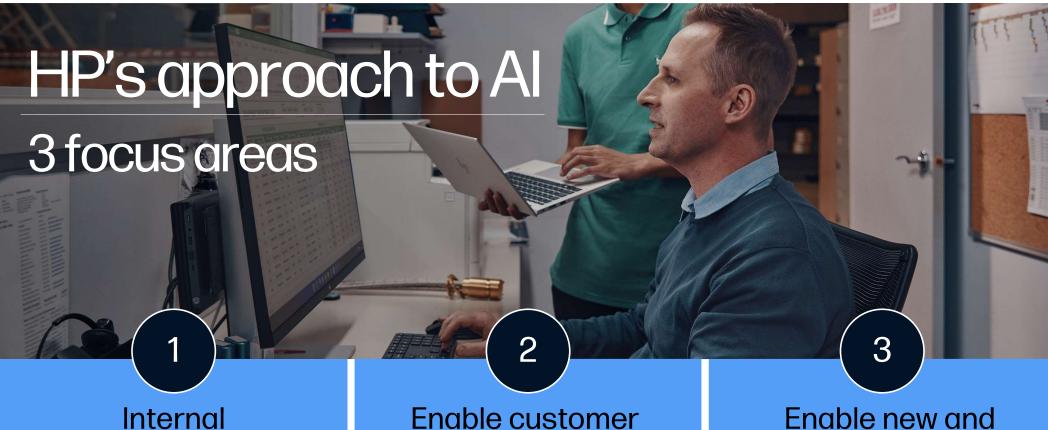
The rules that governs planet, nations, states, counties, and cities.

#### Responsibility



#### Management

- → Security
- → Safety
- → Societal impact
- → Sustainability
- → Accountability



Internal operational efficiency

Enable customer services and support Enable new and differentiated solutions





# Enable new and differentiated solutions

'70s to '80s

'90s to Today

Now into the Future

**Command Line** 

Graphical User Interface

Personal & Natural







First access to personal computing

PC became easier to use

PC becomes an extension of you



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# We identified 9 Personas at work; IT groups them into 4 big types

Low

choice autonomy Very low

Very low

Medium

#### MODERN LEADERS **ROUTINE WORKER** TECH EXPERTS KNOWLEDGE WORKER JTBD - high complexity JTBD-high complexity JTBD - low complexity/tactical JTBD-medium complexity/strategic Frontline Office Remote Road warriors Executives, Managers IT, Developers Creative experts Support pros independents collaborators collaborators pros 7% WHY-+ Portability; + Specific needs (e.g., demanding + Efficiency. Ease of use / needs Professional image, social tasks). Peace of mind control Self-expression connection Conceptual/Analytical Supporting / Admin Internal stakeholder /job Work Strategic tasks, Customer interaction, Work collaboration, Supporting / Admin Customerinteraction Graphic design Software Managing tasks customer interaction. Work · training, education, Work with physical Conceptual/analytical Conceptual/Analytical development, data · Conceptual/analytical but also hands-on on Collaboration with documents work, analytics, engineering Manual work Customer interaction Work work several tasks internal stakeholders Focus work Focus work and business partners WHERE mobility Office WFH Office & WFH On-the-go Desk centric On-the-go Flex Tech

Low

Medium-Low

Very high

High

Very high

# How will these personas use Al?

Modern leaders

**Specialists** 

Frontline and back-office workers

Knowledge workers



















Needs

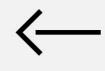
Portability; Professional image, social connection

Specific & demanding tasks, self-expression

Ease of use / peace of mind

Efficiency, control

Primary uses for Al



Remove unproductive work

Breakthrough efficiencies

Remove communication barriers (e.g. real time translation) Discover New superpowers





## Solution driven portfolio offering by Persona



















Frontline Mobile





EliteBook 840/845 640/645



Office Collaborator







EliteBook 830 x360



EliteBook 1040 x360



Dragonfly



EliteBook

X G1a





Detachable Elite x2



EliteDesk

800 Mini

HP Series 7 Pro 27" 4K 4 Monitors - 727pm & 727pk



Monitor

HP Series 7 Pro 27" 4K

Conferencing and Thunderbolt HP E27u G5 FHD

Monitor HP E34m G4 WOHD Curved HP Series 7 Pro 27" 4K

HP Series 7 Pro 27" 4K

HP Series 7 Pro 24" WUXGA

Conferencing and Thunderbolt HP E27u G5 FHD

USB-C Conferencing Monitor HP Series 7 Pro 27" 4K

HP Series 7 Pro 27" 4K

HP Series 7 Pro 27" 4K

HP Series 7 Pro 24" WUXGA

HP Series 7 Pro 27" 4K

HP Series 7 Pro 24" WUXGA



HP Series 7 Pro 27" 4K Monitors - 727pm & 727pk

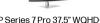


HP Series 7 Pro 24" WUXGA HP E14 G4 Portable Monitor



HP Series 7 Pro 34" WOQHD





ZBook with dGPU

14" & 16"

Conferencing Monitor - 734pm Thunderbolt 4 Monitor - 732pk Thunderbolt 4 Monitor - 738pu



#### Collaboration

Display





FHD Webcam



Poly Voyager Focus 2 with universal stand HP 625 FHD Webcam



Poly Voyager 4300 UC. HP 965 \$K Webcam



Poly Voyager 5200 UC. Voyager Free 60 + UC, HP 435 FHD Webcam



Poly Voyager Free 60+ UC. HP 965 4K Webcam



Poly Voyager Focus 2, HP 965 \$K Webcam



Poly Voyager Surround 80, HP 965 4K Streaming Webcam



## Business Notebook Portfolio



Notebook images not shown to scale.



NPU<sup>23</sup> available on select configurations



# Z by HP mobile workstation portfolio





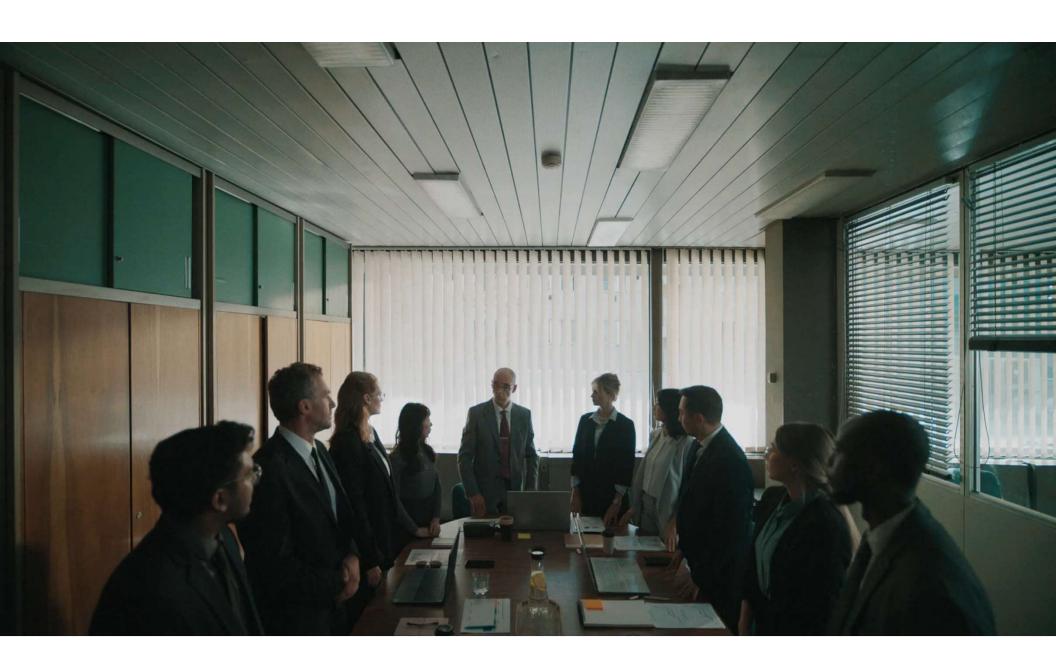








ZBook Mobile Workstations							
Firefly 14 G11 A	Firefly 14" & 16" G11	Power 16 G11A	Power 16G10	Studio 16 G11	Fury 16 G11		
Up level performance. Not Size.		Pro-grade performance within reach.		Powerfully immersive. Perfectly sized.	So powerful you'll forget it's a laptop.		
Up to							
<ul> <li>AMD Ryzen™ 9 7940HS PRO CPU³</li> <li>Integrated AMD Radeon™ graphics</li> <li>64GB DDR5 5600⁵ SODIMM</li> <li>2TB NVMe SSD6</li> </ul>	<ul> <li>Intel vPro® with 14th Gen Intel® Core™ U7 processor¹.2</li> <li>NVIDIA RTX™A500⁴</li> <li>64GB DDR5 5200 SODIMM⁵</li> <li>2TB NVMe SSD6</li> </ul>	<ul> <li>AMD Ryzen™ 9 7940HS PRO CPU³</li> <li>NVIDIA RTX™ 2000 Ada⁴</li> <li>64 GB DDR5 5600 SODIMM⁵</li> <li>8TB NVMe SSD6</li> </ul>	<ul> <li>Intel vPro® with 14th Gen Intel® Core™ U7 processor¹.²</li> <li>NVIDIA RTX™ 3000 Ada⁴</li> <li>64 GB DDR5 5200 SODIMM³</li> <li>8TB NVMe SSD6</li> </ul>	<ul> <li>Intel vPro® with 14th Gen Intel® Core™ U9 processo r¹²²</li> <li>NVIDIA RTX™ 4000 Ada or GeForce RTX™ 4080⁴</li> <li>64 GB DDR5 5600 SODIMM⁵</li> <li>4TB NVMe SSD6</li> </ul>	<ul> <li>Intel vPro® with 14th Gen Intel® Core™</li></ul>		
AMD∄	intel	AMD <b>∄</b>	intel	intel	intel		



# World's most powerful, ultra-mobile next-gen AI PC.



### Introducing HP's Next-Gen Al PCs

# EliteBook Ultra series

#### Designed to optimize the potential of Al

Includes a **45 TOPs NPU<sup>23</sup>** (trillions of operations per second) that's powerful enough to help AI think & act fast

#### Built with the future of Al in mind

Architected to support the use of Al locally on the device

#### Meets Microsoft's Windows Next-Gen AIPC standards

Built to meet performance, memory, security & design guidelines





# HP's First

# Next-Gen AI PC<sup>1</sup>



Power to use Al locally with Qualcomm<sup>®</sup> Snapdragon<sup>®</sup> X Elite and Plus Platform processors<sup>3</sup> with 45 TOPS NPU<sup>23</sup>



Explore the capabilities of this Copilot+ PC<sup>8</sup>



Ultra thin. Ultra light. Ultra mobile.



Freedom to work on the go with long battery life

**poly** camera pro

Optimal conferencing experience with Poly Camera Pro<sup>42</sup> and audio tuned by Poly Studio<sup>11</sup>













Joining forces with AMD to deliver the most powerful EliteBook X

Ryzen Al 9 PRO

HX 375 (55 TOPS)\*

\*HP/AMD exclusive

#### No HP EliteBook X G1a Next Gen Al PC

# Al Performance to higher levels



Power to use Al locally with AMD Ryzen Al processor and up to 55 TOPS NPU (HP exclusive)



High compute and graphics performance in a business notebook



Cool & quiet experience enabled by HP Smart Sense and dual turbo high density fans



HP Al Companion, your built-in Al assistant automates everyday tasks to keep you running at your best.



Optimal conferencing experience with Poly Camera Pro and audio tuned by Poly Studio

Power & performance for Copilot+

experiences

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# What's New

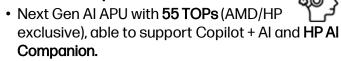
HP FliteBook X G1a Next Gen AI PC

REDEFINE THE PERFORMANCE IN **HYBRID WORK** 



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- Unprecedented power in a thin and light premium device with 40W Thermal Design Power for better responsiveness and smoother multitasking.
- Larger battery + efficient processing to deliver long battery life
- Improved cool & guiet experience enabled by HP **Smart Sense**

#### Design

- New premium design with Glacier Silver in a thinner & smaller chassis
- Up to 90.84% Screen to Body Ratio
- · GS Mark compliant keyboard for a safe and ergonomic typing experience

#### Collaboration

#### poly

- Poly Cam Pro to manage all video and audioconferencing experiences in single place for built-in & external cameras.
- Onlooker Detection w/screen blur Receive a notification when another person is looking at vour screen and screen will blur
- High Dynamic Range video Enhances video clarity, contrast, and vividness

#### Sustainability & Security

- 100% sustainable packaging materials
- Next Gen secured storage eliminate ITDM security concerns on Al and ensure the safety and protection of the data.
- Monitor and offset carbon footprint with power consumption





HP EliteBook X G1a 14 inch Next Gen AI PC

# Productivity experiences







#### NEW Onlooker detection

Notifies you when an onlooker is detected behind you and allows you to blur your screen for privacy. Click here to learn more.



### **NEW** Adaptive dimming

To help conserve your PC's battery, your screen will automatically dim if it detects that you are not attentive.



### Auto lock and awake

To keep your data secure, your PC automatically locks when you walk away and wakes when you return. Click here to learn more.







"I like the idea that Al would dynamically adapt my computer's settings to enhance battery life, improve display, and [improve] the camera image during video meetings." 102



An accelerometer uses Al to learn your motion patterns

On Table/On Lap detection<sup>101</sup> intelligently **cools your device** 

Wake Up on Pick Up enables instant productivity



Al that tailors your PC performance to you

Smart Sense v35

Battery Manager<sup>100</sup>

**OLED Power Saving Mode** 

Power Consumption Measurement<sup>99</sup>
Intelligent Workload Classification

<u>--λ</u>--

Show your true colors with Al that senses light conditions

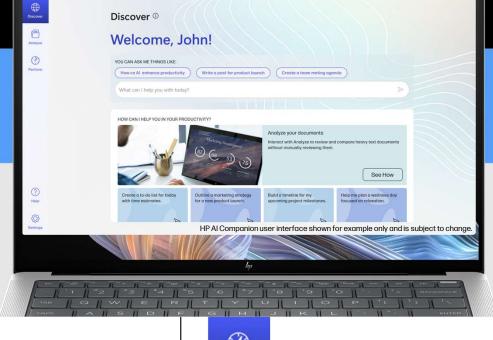
The new Al-enhanced webcam sensor (ISP+ camera) enables more accurate HDR video streaming so you look your best during video calls.





### Al at your fingertips

Your personal built-in Al Companion<sup>2</sup> elevates everyday tasks to keep you performing your best.





Ask, discover, and get intelligent assistance



Analyze and query your personal files



Perform at your best with an HP settings and support assistant<sup>76</sup>



## Ask, discover, and get intelligent assistance

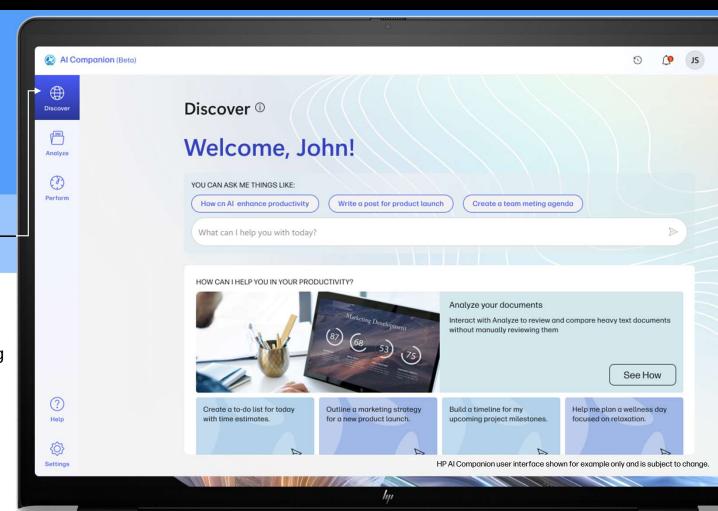
Experience the power of knowledge at your fingertips.

#### Learning made easy with Al

Seamlessly explore new topics and find answers to anything you need, leveraging web content.

#### Boost your Al-first mindset

Try asking Al Companion for information, advice, creative ideas or simply start a conversation to learn more about Al.





## Analyze and query your personal files

Take CTRL+F to the next level. Interact with your documents.

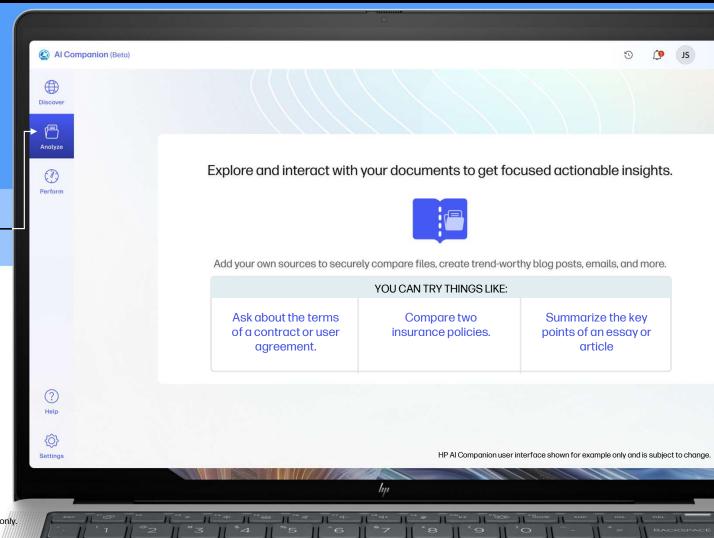
### Secure & personal78

Compare information, summarize key points, and filter specific data from documents within your private file library.

#### **NEW** Now analyze more file types

Analyze your images, diagrams, PDFs, PPT slides and more.<sup>76</sup>





## Al-powered HP settings and support assistant

Explore the NEW Perform<sup>76</sup> tab in HP Al Companion

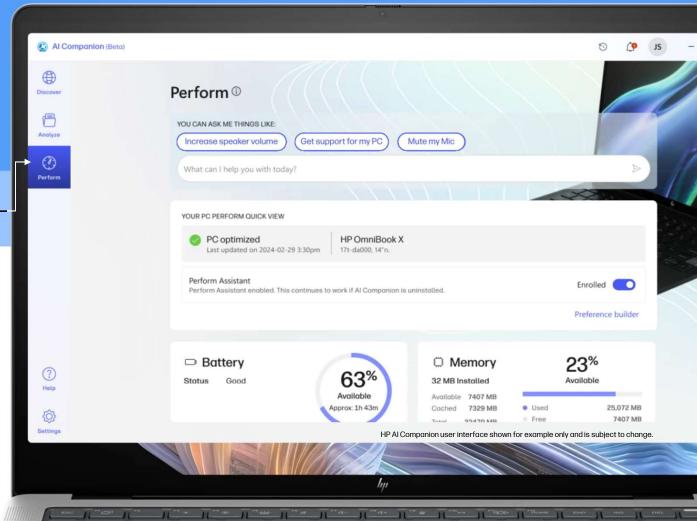
### Settings

Type a command to adjust your PC's settings

#### Support

Get conversational help for all your HP products with a support assistant that scours more than 100,000 product manuals





## One-touch access to your Al assistant<sup>8</sup>

Offload tasks to Microsoft Copilot so you can be more productive





C

Microsoft Copilot<sup>11</sup> key opens the prompt window so your Al assistant is at your fingertips.



# Easy connectivity from your hybrid workspace

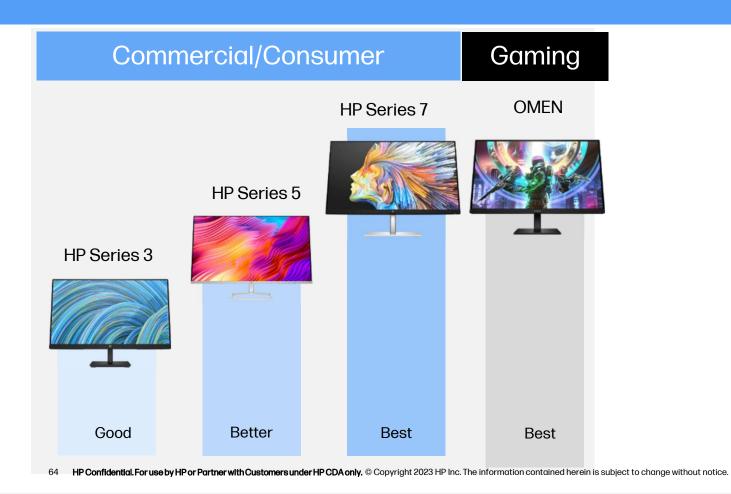


#### Fast and efficient Wi-Fi 7

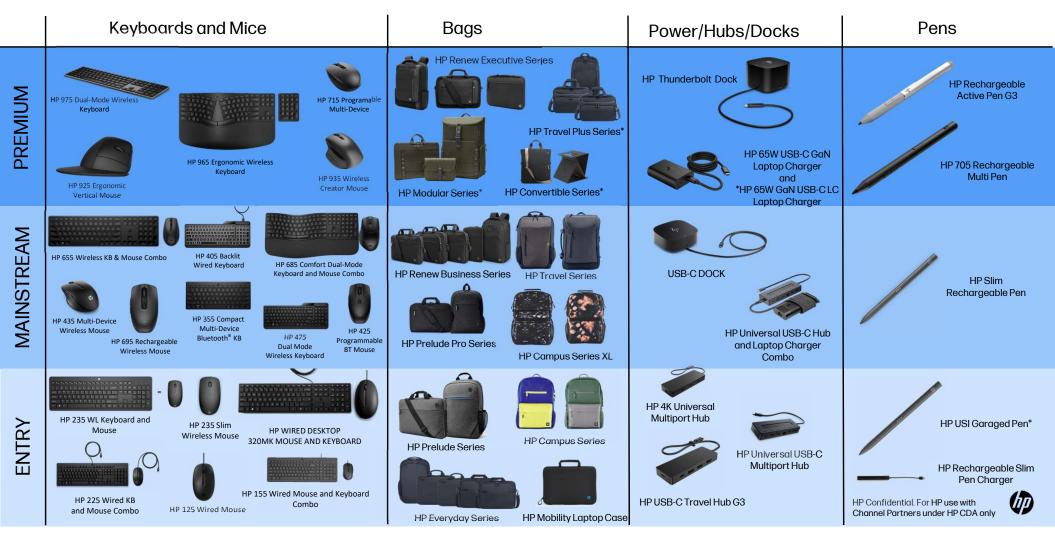
The portability of your PC and the reliability of a fast connection determines where you can work. Get a fast and reliable connection in dense wireless environments with gigabit data rate Wi-Fi 7.<sup>13, 57</sup>

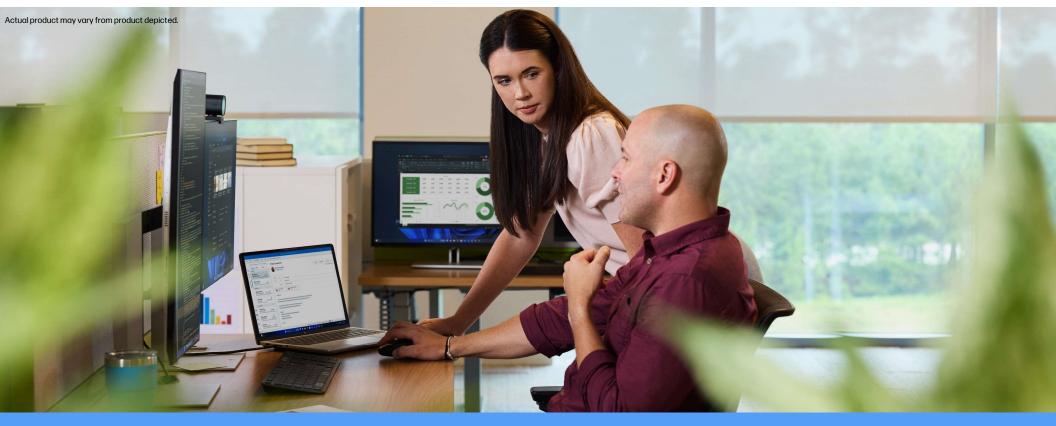


### Displays Portfolio



### HP Branded Peripherals Portfolio



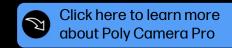


HP EliteBook X G1a 14 inch Next Gen AI PC

### Collaboration experiences



### **poly** camera pro<sup>®</sup>



A conferencing experience that

makes you want to turn on your camera



**Spotlight** 

Background Blur & Replace

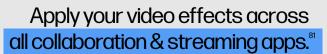
**Filters** 

Auto Framing<sup>82</sup>

Customizable Scenes & Watermarks

Image Adjustments

Recording Mode















0.8



## Audio tuning by Poly Studio



For those times when you need to record a podcast or video, <u>Studio Mode<sup>27</sup></u> provides **optimal** frequency range for high-quality stereo recording.

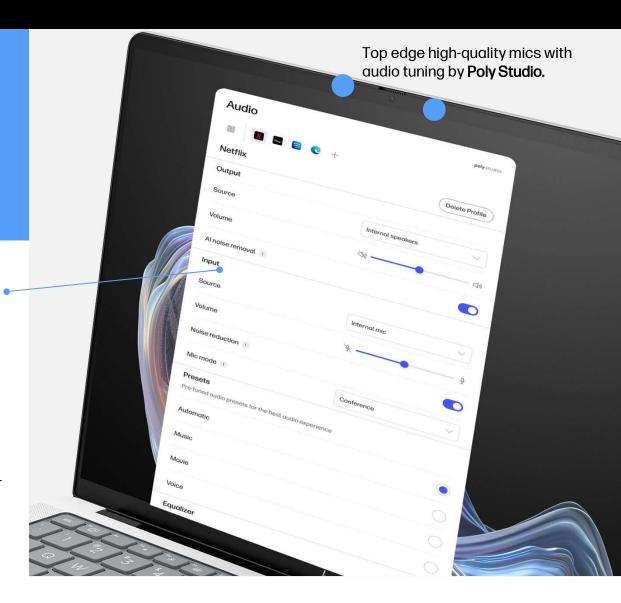


HP Dynamic Voice Leveling<sup>27</sup> automatically enhances microphone gain to optimize voice clarity within 3-meters of the PC.



Al-Based Noise Reduction<sup>27</sup> filters both inbound and outbound background noise – like dogs barking, paper rustling, sirens, and lawn noise – for an enhanced conference call experience.





### Bring authenticity to every meeting





#### Control when you're seen

With the added peace-of-mind of HP Privacy Camera that physically blocks your webcam with a simple slide.<sup>82</sup>



#### Look sharp

With the high-resolution 5MP AI ISP camera



#### Your PC recognizes you

A new **Al-enhanced webcam sensor** is used for more accurate presence detection experiences such as onlooker detection and adaptive dimming.





HP EliteBook X G1a 14 inch Next Gen AI PC

## Supports Windows Studio Effects

Creative filters

Portrait Light

Eye Contact

Voice Focus

Portrait Blur

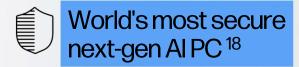


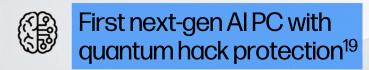


HP EliteBook X G1a 14 inch Next Gen AI PC

### Privacy & Security







# Think safe.

Security without compromise





EliteBook



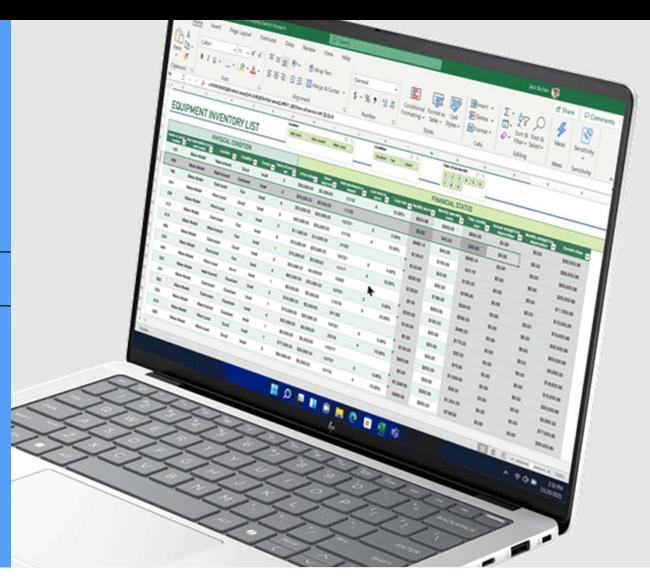


# Help protect your sensitive information

**NEW** Onlooker Detection<sup>27</sup> with Screen Blur



Utilizing a new Al-enhanced webcam sensor, your PC will notify you when an onlooker is detected behind you and automatically blurs your screen if needed.





## Remain unseen, no matter what

HP Privacy Camera<sup>82</sup> physically blocks your webcam with a simple slide



### Peace of mind

Stop webcam hackers from seeing anything<sup>27</sup>



### Avoid webcam slip ups

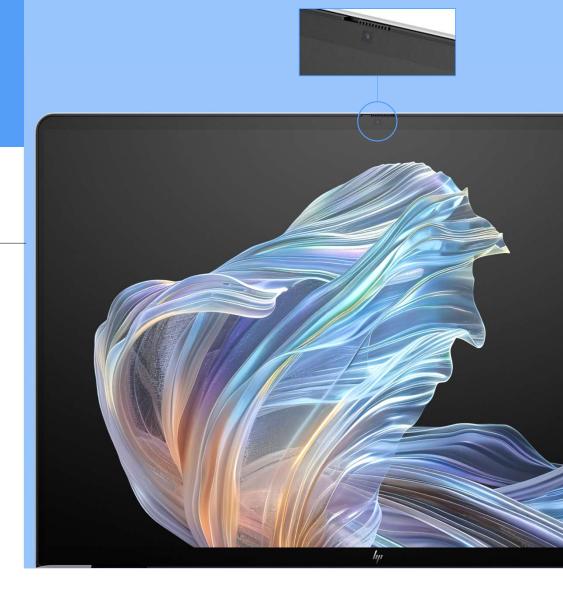
Ensure you are off camera on a web call



### Easy-to-use

Turn on and off with a single swipe





### Protected by HP Wolf Security\*\*



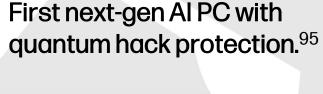
Part of the world's most secure and manageable PC portfolio



NEW Reinforced endpoint security controller future-proofs your device and protects against evolving threats.

Above the OS	HP Management Integration Kit <sup>35</sup> HP Privacy Camera	
In the OS	HP Client Security Manager <sup>87</sup> HP Sure Sense <sup>88</sup> HP Sure Click <sup>89</sup>	Advanced security options HP Wolf Pro Security Edition <sup>92</sup> HP Wolf Enterprise Security <sup>93</sup> HP Protect and Trace <sup>84</sup>
Below the OS	HP BIOSphere <sup>30</sup> HP Sure Start <sup>85</sup> HP Sure Admin <sup>91</sup> HP Sure Run <sup>90</sup> HP Tamper Lock <sup>32</sup> HP Sure Recover <sup>86</sup>	







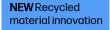




### Sustainability & durability









Heat plate made with at least

50% recycled copper<sup>17</sup>



Covers made with up to

80% recycled aluminum<sup>17</sup>



Keycaps made with up to

65% recycled plastic 60



Speakerbox made with

30% ocean-bound plastic<sup>52</sup>



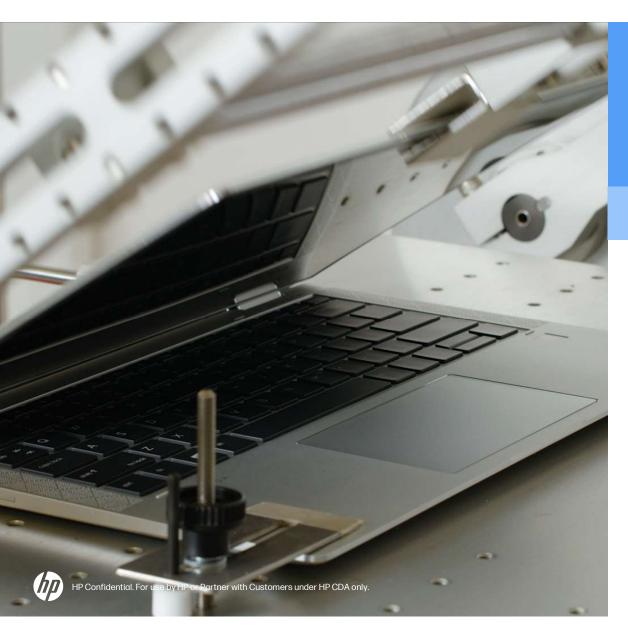
Bezels made with at least

20% recycled cooking oil 59



100% sustainably sourced packaging<sup>16</sup>





## Durable construction

### Built to last





The real challenge of building thin, light, and powerful is to remember where this device will be used: in a mobile environment.

## We believe HP will deliver what no one else can E2E

Strength of HP + Poly technology delivering E2E solutions from PC to meeting room

The world's **most** secure PC portfolio

Providing **robust experiences** in terms of thermals, performance, acoustics and battery life

Strength of ecosystem technology partnerships across the industry

The most sustainable and just company helping customers achieve their sustainability goals

Engineering purpose-built hardware and sensor placements for Al workloads

Hardware and software innovations designed to enable the future of work with Al

Al-driven services and support that help customers be at their best - always



