

Shaping the Future of Private AI Cloud & Agentic Innovation

September 2026





David
Ardbelava

EMEA Director

GTM & Sales Strategy & Solution Engineering
Teams

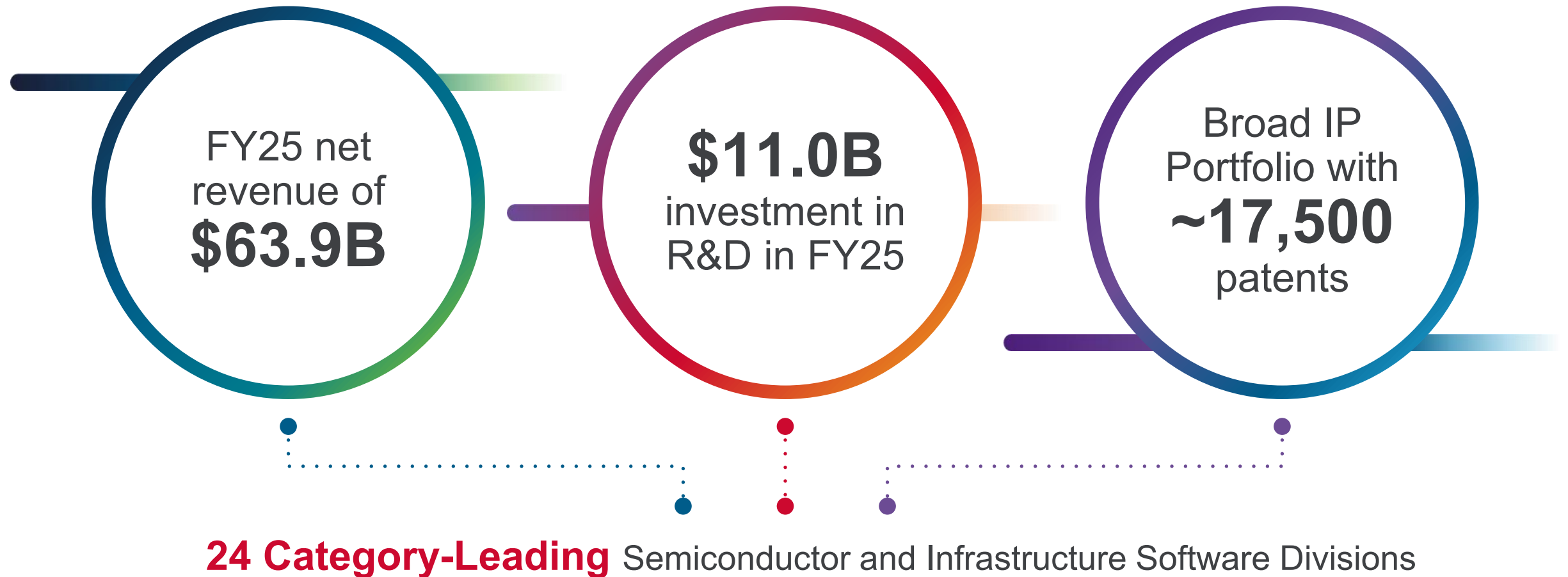


Mujtaba Mir

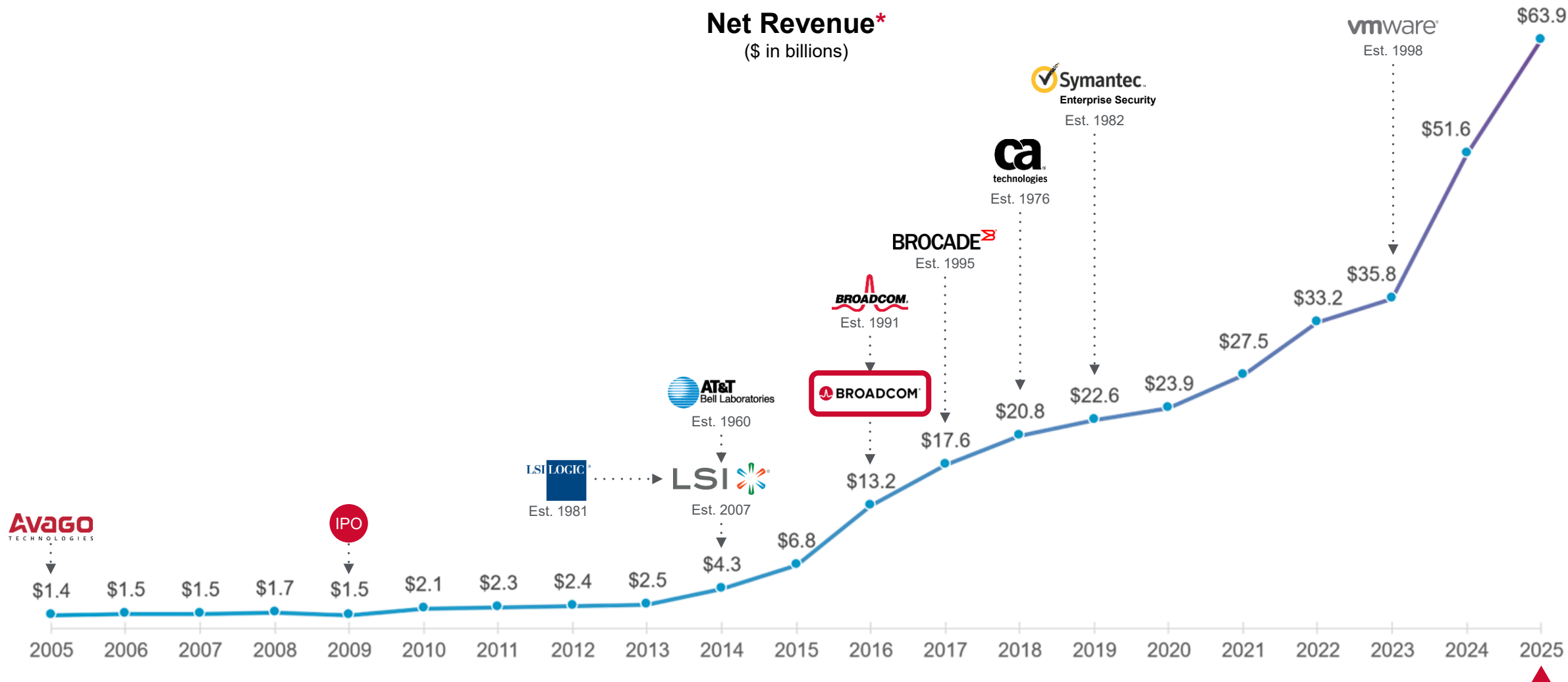
Principal Solutions Engineer

Broadcom at a Glance

Providing Market-Leading Semiconductor and Software Technologies for Mission Critical Infrastructure



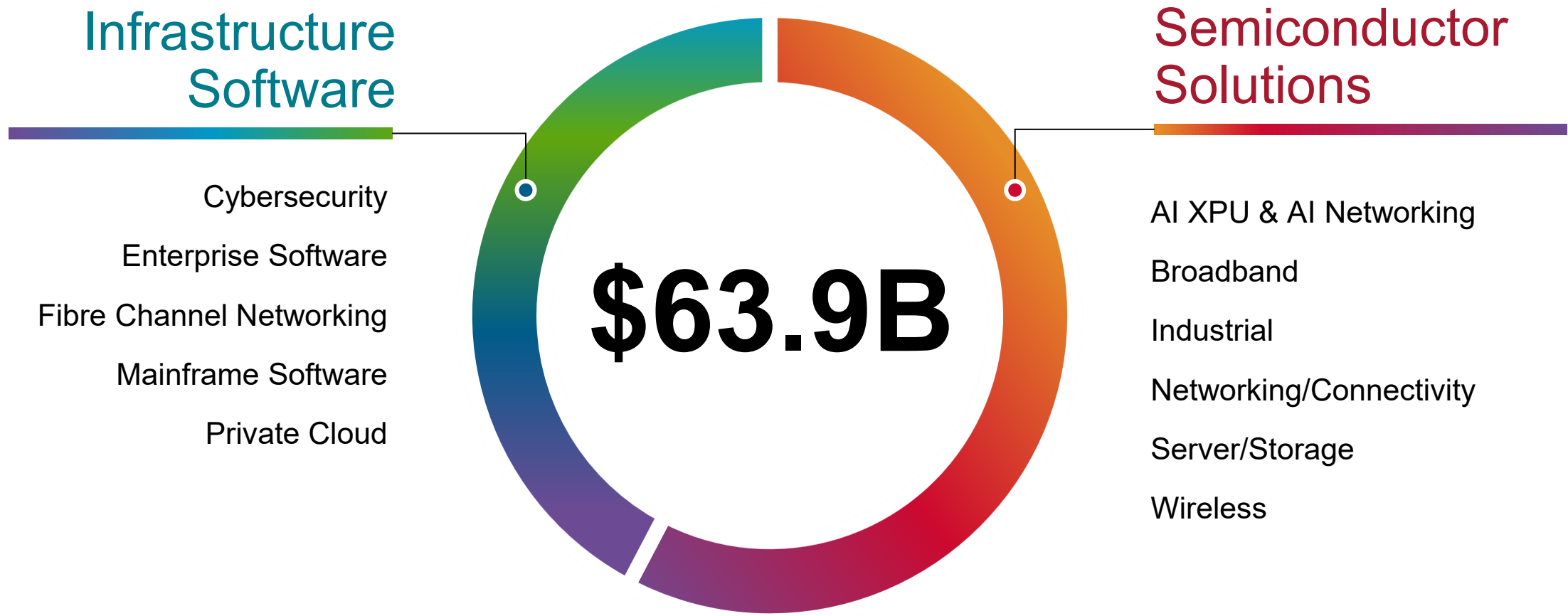
Growth Through Acquisition and Innovation



* FY05 represents predecessor net revenue from Semiconductor Products Group of Agilent Technologies, Inc. reported on Form S-1 filed by Avago Technologies Limited with the Securities and Exchange Commission on August 21, 2008. FY06 through FY15 represents Avago Technologies Limited historical net revenue. FY16 represents combined full year Avago Technologies Limited net revenue and contributions from the acquired Broadcom Corporation business with effect from February 1, 2016. FY17 represents Broadcom Limited historical net revenue. Broadcom Inc. is the successor to Broadcom Limited effective April 4, 2018. Net revenue amounts between FY05 and FY18 are reported under Accounting Standards Codification ("ASC") 605, Revenue Recognition. Net revenue amounts beginning in FY19 are reported under ASC 606, Revenue from Contracts with Customers.



Fiscal Year 2025 Revenue



Innovation Is the Heart of VMware

A Story of Firsts



The Opportunity of AI



27%

Productivity Growth in
AI-exposed Industries



5x

Revenue Growth for
AI-built Companies

AI Delivers Outsized Impact Across the Value Chain



40% Reduction
in Decision
Making Time



3x Higher
Revenue per
FTE



3.2x AI
Application
Market Increase



40% Measurably
Better Outcomes

Sources:

<https://www.pwc.com/id/en/media-centre/press-release/2025/english/ai-linked-to-fourfold-productivity-growth-and-56-percent-wage-premiums.html>
<https://www.bcg.com/publications/2025/are-you-generating-value-from-ai-the-widening-gap>
<https://www.glean.com/perspectives/enterprise-insights-from-ai>
<https://www.pwc.com/id/en/media-centre/press-release/2025/english/ai-linked-to-fourfold-productivity-growth-and-56-percent-wage-premiums.html>
<https://menlovc.com/perspective/2025-the-state-of-generative-ai-in-the-enterprise/>

AI is a Cost and Risk Multiplier

Sources:

1. <https://cjbarroso.com/blog/2025/risks-ai-exposure/>
2. Kaspersky: <https://www.metomic.io/resource-centre/the-hidden-data-leakage-crisis-how-genai-tools-compromise-enterprise-security>
3. <https://introl.com/blog/gpu-infrastructure-tco-5-year-cost-model>
4. <https://www.bcg.com/publications/2025/ai-shifts-it-budgets-to-growth-investments>
5. <https://www.techbuzz.ai/articles/ai-s-hidden-cost-memory-rivals-gpus-in-infrastructure-race>

73%

of Enterprises Report¹ AI-related Security Incidents

20-40%

Additional Yearly Infrastructure TCO³

67%

of Enterprises reporting Shadow AI Usage² putting your Data and IP at Risk

2026-2031

Strategic Shifts Reshaping Enterprise Infrastructure





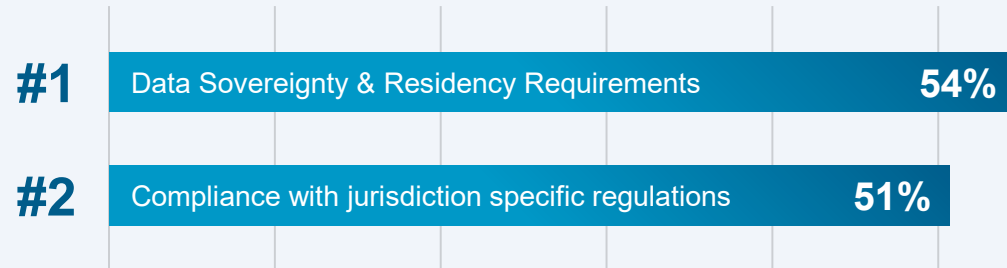
The Sovereignty Mandate: The New Non-Negotiable

Geopolitics is Reshaping Enterprise IT



4 out of 5 IT leaders state **geopolitics and regulatory factors** affecting IT strategy and operations

TOP IT ORGANIZATION IMPACTS DUE TO GEOPOLITICAL FACTORS



Data is based on a global survey conducted by Radius Tech in partnership with Broadcom. Radius Tech surveyed 1,800 senior IT decision-makers in February - March 2026 across 8 countries in North America, Europe, and Asia-Pacific.

“The biggest gap lies in data sovereignty: while we expected to run AI workloads securely in the cloud, strict data protection laws have significantly restricted the processing of sensitive administrative data in public environments.”

IT Director, Public Sector, Germany

“I thought compliance would be a minor checklist item, but governance requirements reshaped our entire architecture.”

C-Suite Executive, Healthcare, United States

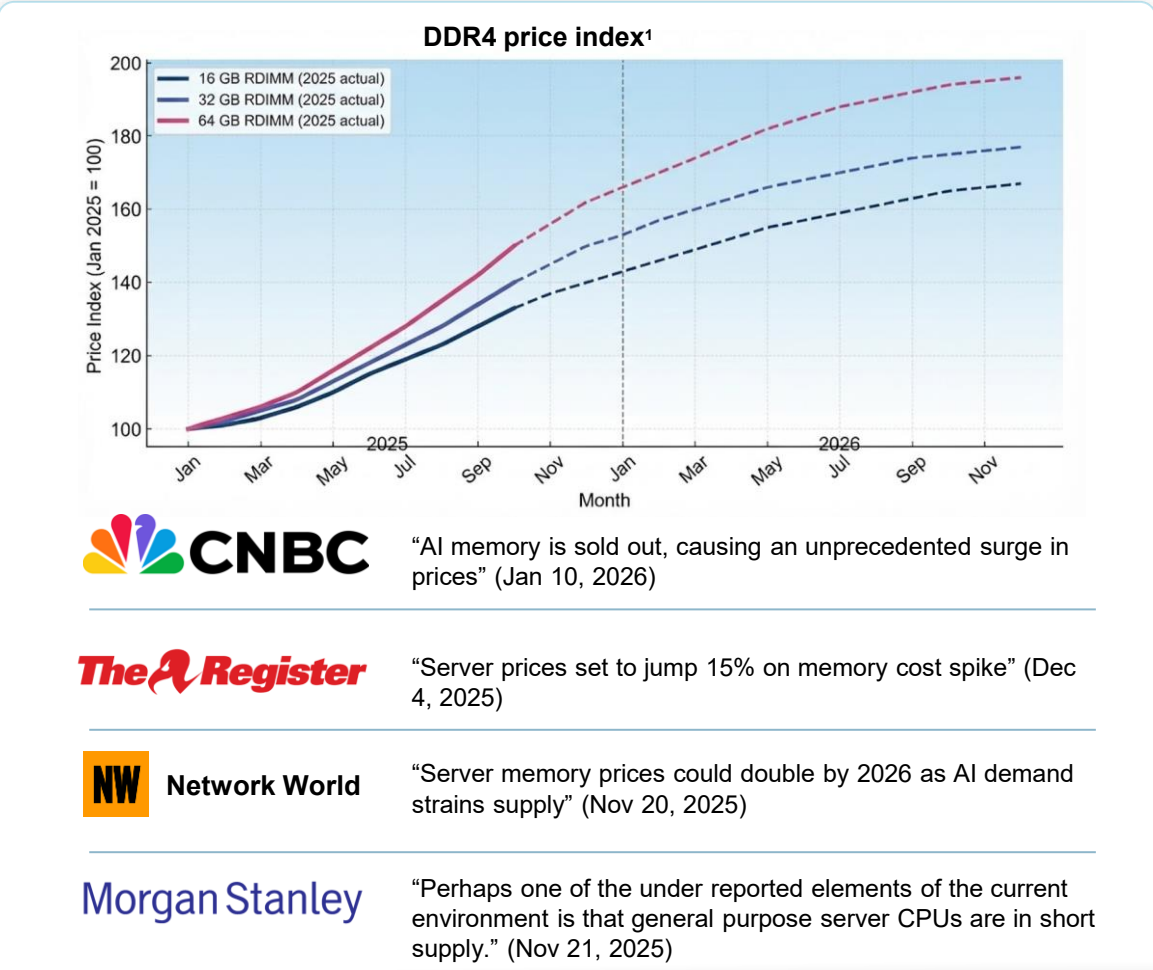


Prediction:

Data sovereignty will rank alongside cybersecurity as a board-level infrastructure priority

Constraining Costs - Hardware Structural Supply Crisis

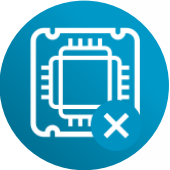
Servers, Switches, Components - all impacted



Skyrocketing memory prices: standard DRAM prices are set to double this year.¹



Sticker shock for hardware: Standard server components follow this trend due to component price inflation.¹



Sold out inventory: Major suppliers report their capacity is effectively sold out through 2026.²



Structural shortage: Supply shortages expected to grow through 2027.²

1. NewServerLife. “Why DDR4 Prices Are Soaring - And Why It Matters For Your Next Server.” Oct 2025.
2. Goldman Sachs Global Investment Research

Server Memory Cost Grew in One Quarter

+90%

server DRAM contract prices, quarter over quarter, Q1 2026. The largest quarterly increase on record.

NAND FLASH

+55 to 60%

QoQ,
Q1 2026

ENTERPRISE SSD

+53 to 58%

QoQ, aQ1 2026.
Also a record

SERVER DRAM

+13 to 18%

QoQ forecast,
Q3 2026

UNDERSUPPLIED

Through 2027

Quarterly increases
expected 2H26 to 2H27

JUN 2025

Memory tiering ships in VCF 9.0

JAN 2026

Server DRAM sets a record

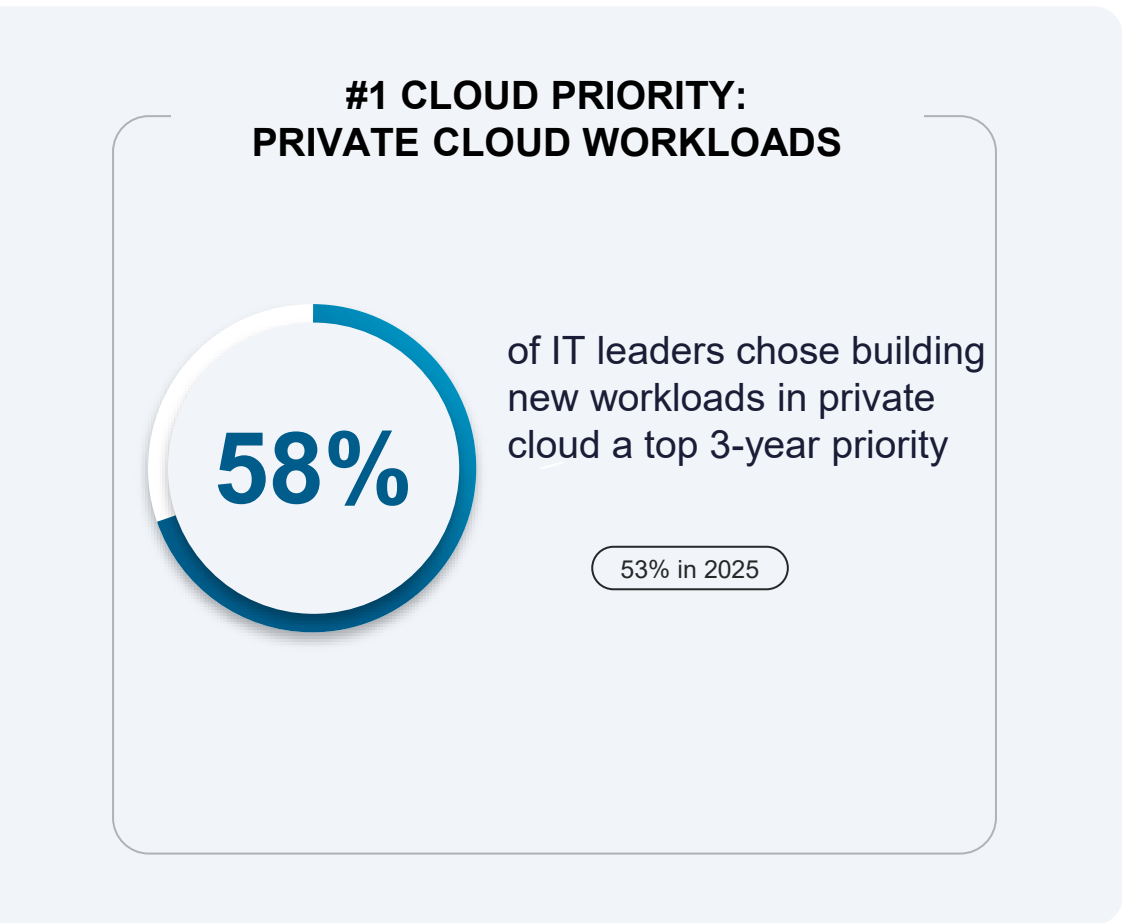
MAY 2026

Tiering enhanced in VCF 9.1

Sources: TrendForce press releases, Feb 2, 2026 and Jul 9, 2026 (3Q26 figure is a forecast). VMware Cloud Foundation blog, Jun 19, 2025.

Private Cloud Workloads Continue to Surge

IT leaders prioritizing private cloud investment



ENTERPRISES CLOUD STRATEGY BUDGET PLANNING FOR NEXT 3 YEARS

2025	2026	increase	
51%	72% ▲	+21 budget intent increase private cloud	 Private cloud
61%	71% ▲	+10 budget intent increase public cloud	 Public cloud

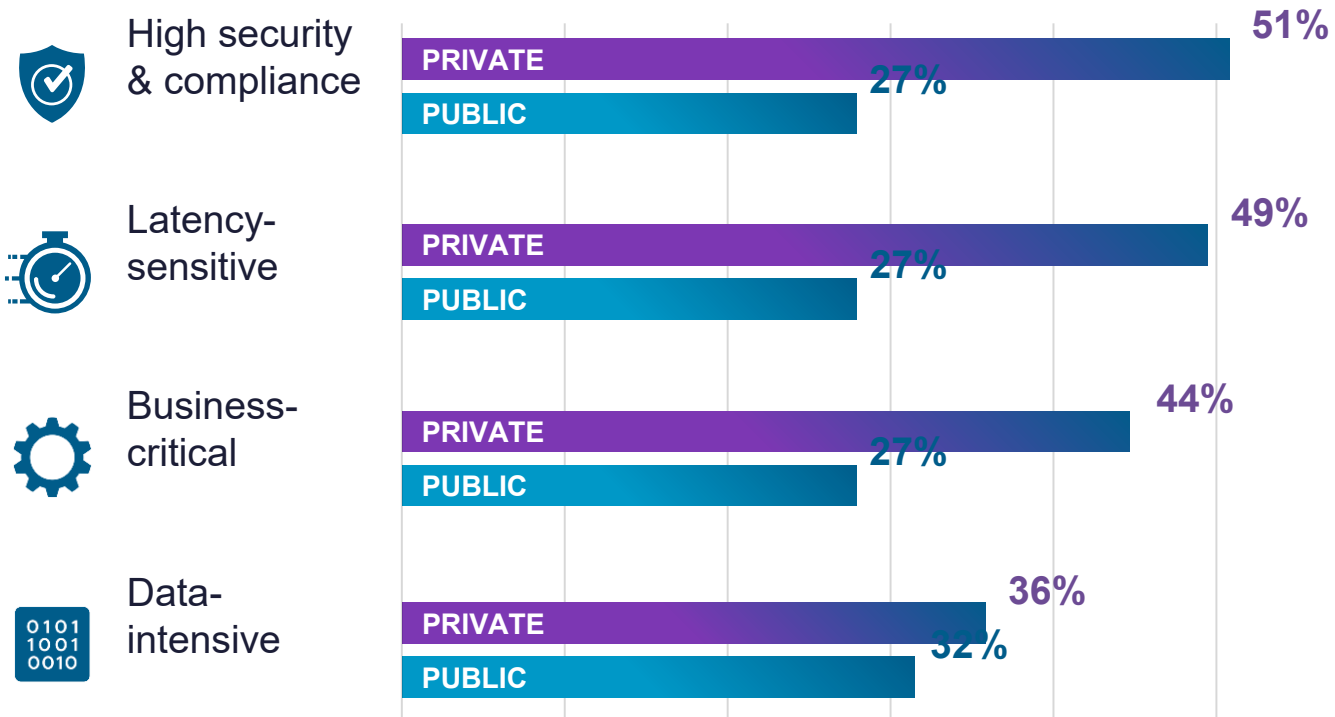
2x faster growth for private cloud



Private Cloud Leads for High-Stakes Workloads

Most Enterprise IT teams have a standardized workload placement strategy

PRIVATE CLOUD LEADING THE WAY

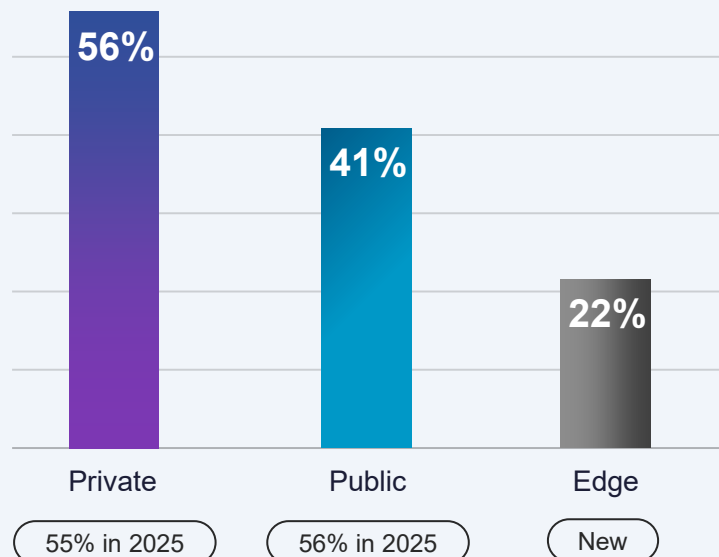




The Inference Shift: AI Demands Governance and Cost Control

Private cloud is the preferred platform for production AI

WHERE ENTERPRISES PLAN TO RUN INFERENCE/PRODUCTION WORKLOADS



SECURITY

- Top AI requirements are
#1 Data protection & privacy
#2 Security & control

COST

- 62%** of IT leaders very or extremely concerned about **Gen AI / Agentic AI costs**

“AI models functioned smoothly during the testing phase but required significant optimization and adjustments after actual deployment. The associated costs were high, and the return on investment took a relatively long time to materialize.”

Director of IT, Public Sector, United States



Prediction:

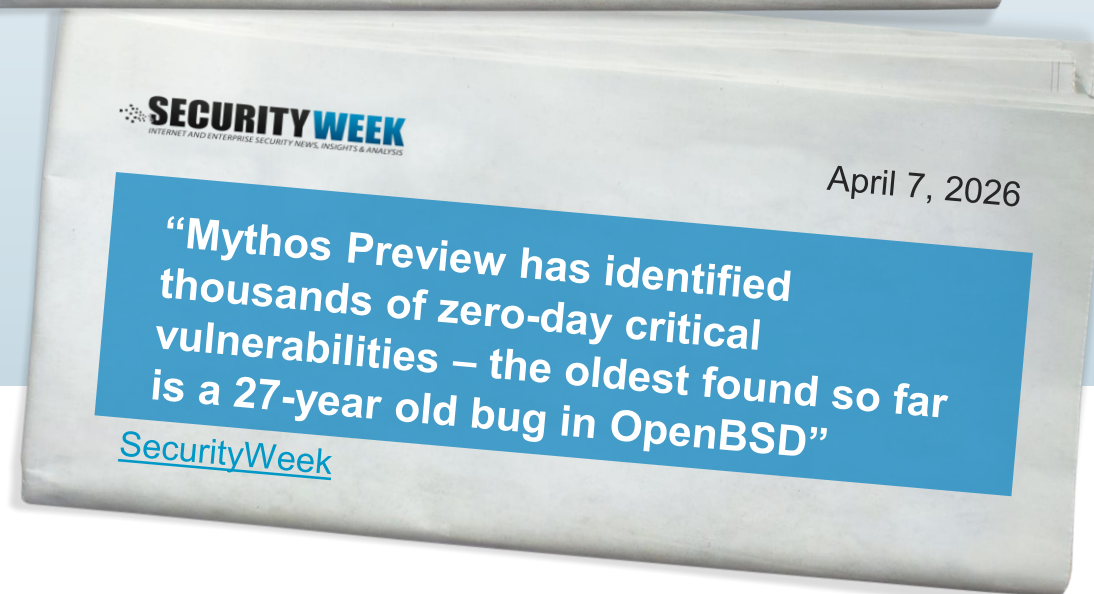
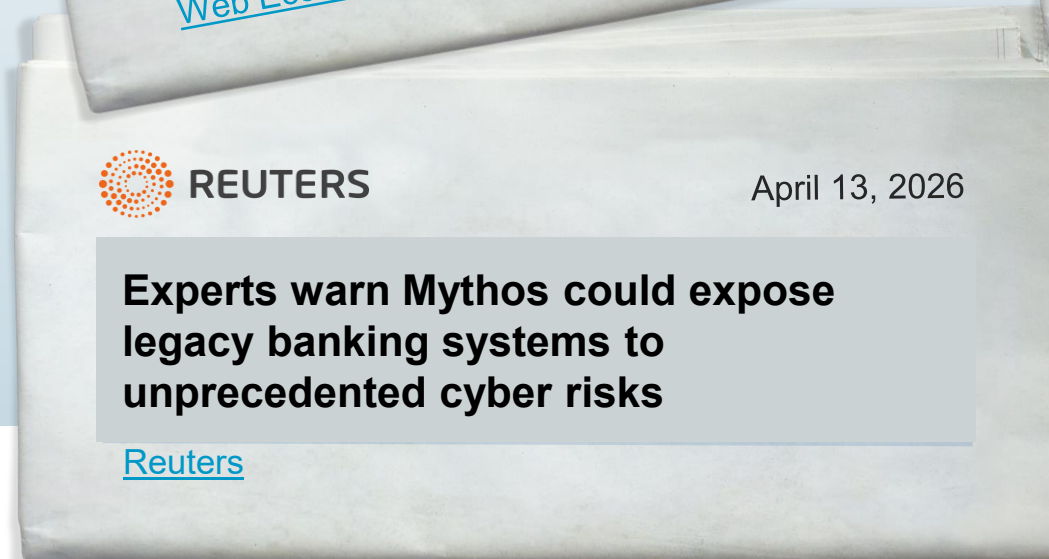
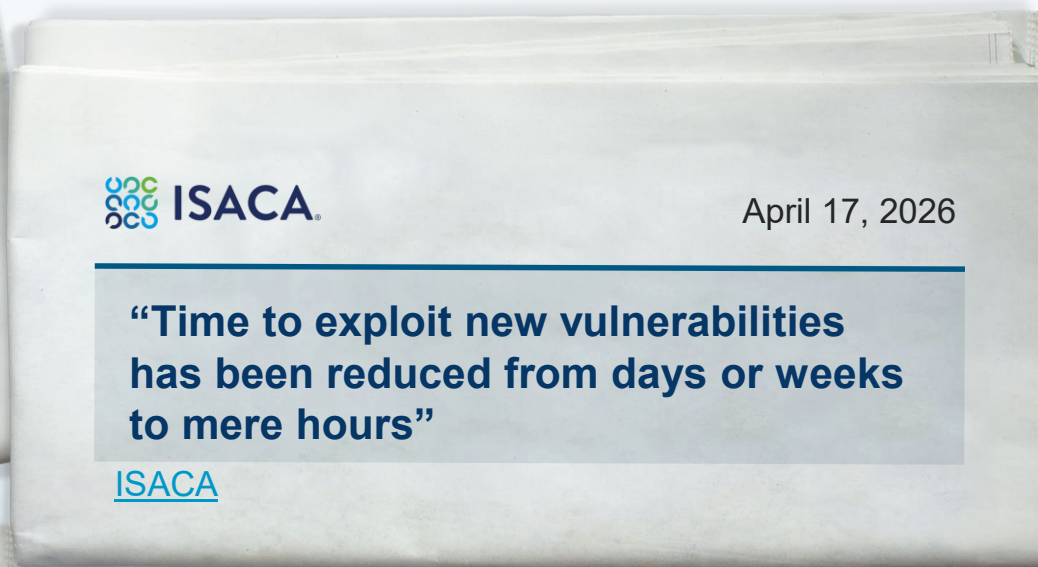
AI is changing cloud economics; 3 C's – costs, complexity and control are driving to private cloud solutions

Data is based on a global survey conducted by Radius Tech in partnership with Broadcom. Radius Tech surveyed 1,800 senior IT decision-makers in February - March 2026 across 8 countries in North America, Europe, and Asia-Pacific.

You will be compromised. It's just
a matter of when....

Are you ready?

Frontier AI Models: A Fundamental Shift in the Threat Landscape



The Current Cost of One Attack

JAGUAR LAND ROVER, AUG 2025

£1.9B

Total economic impact. The most economically damaging cyber event ever to hit the UK.

ASAHI GROUP

SEP 2025

¥47.5B

Entry: one VPN device, then lateral movement.

MARKS & SPENCER

APR 2025

£300M

Nearly a third of annual profit. Suspend online clothing and home orders for 7 weeks.

5 weeks

Production stopped

5,000+

UK organizations hit

JAN 2026

Full production back

Sources: UK Cyber Monitoring Centre, Oct 22, 2025 (JLR, modelled range £1.6-2.1B). Asahi Group disclosures, Jun-Jul 2026. M&S company statement via Bloomberg and CNBC, May 21, 2025.

The Staggering Scale of Attacks in the AI Era

27s

In the Age of AI, attackers spread through the network in under 30min on average (27s is the record)

89%

AI-powered attacks grew 89% in scale in the past year. Most security teams have not scale their operations up.

~50%

Ransomware appears in nearly half of all confirmed breaches for 2024.

Enterprise Mandate: Shift to "Latest-Version-Only" Strategy

To eliminate severe security vulnerabilities, market leaders strictly enforce "N" vs "N-1" version policies—prohibiting outdated software.

1. Modernize, Contain, or Exit

Outdated software is treated strictly as **"technical debt"**. Every asset must take one of three enforced paths:

- **Modernize:** Upgrade continuously to latest versions & cloud-native stack.
- **Contain:** Isolate complex legacy systems with strict retirement timelines.
- **Exit:** Decommission and fully eliminate unsupported software.

No option exists to leave legacy apps unpatched.

2. Strict End-of-Life Tracking

Active lifecycle tracking triggers an immediate countdown upon vendor EOL announcements:

- Teams multiple versions behind are automatically flagged for creating **unacceptable cyber risk**.
- Unpatched, early versions are identified as the **#1 primary attack vector** for hackers.

3. External "Host-to-Host" Policy

Mandates extend beyond internal IT to clients and third-party vendors:

- Partners must maintain applications at **currently supported release versions**.
- Failure to apply the latest security patches results in **systematic file rejection** and severed network connectivity.

Outdated software is an immediate threat. Agility and rapid adoption of "N / N-1" version policies are now baseline requirements.

VMware Cloud Foundation

Most trusted private cloud platform
for all applications

CONTAINERS
NATIVE



VMS
NATIVE

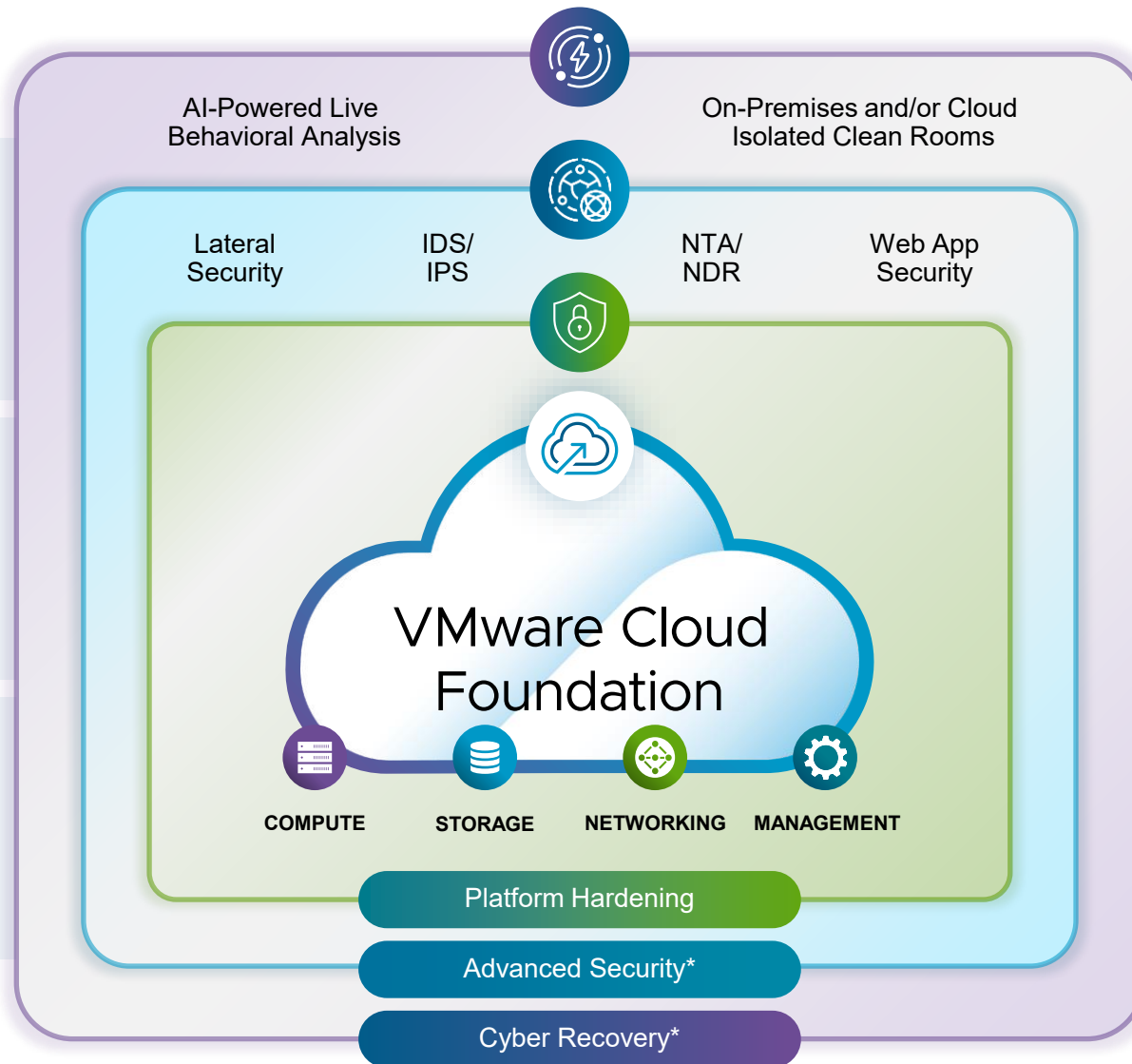


VCF 9 – Defense in Depth

Purpose-Built
Recovery

East-West
Security

Hardened
Infrastructure

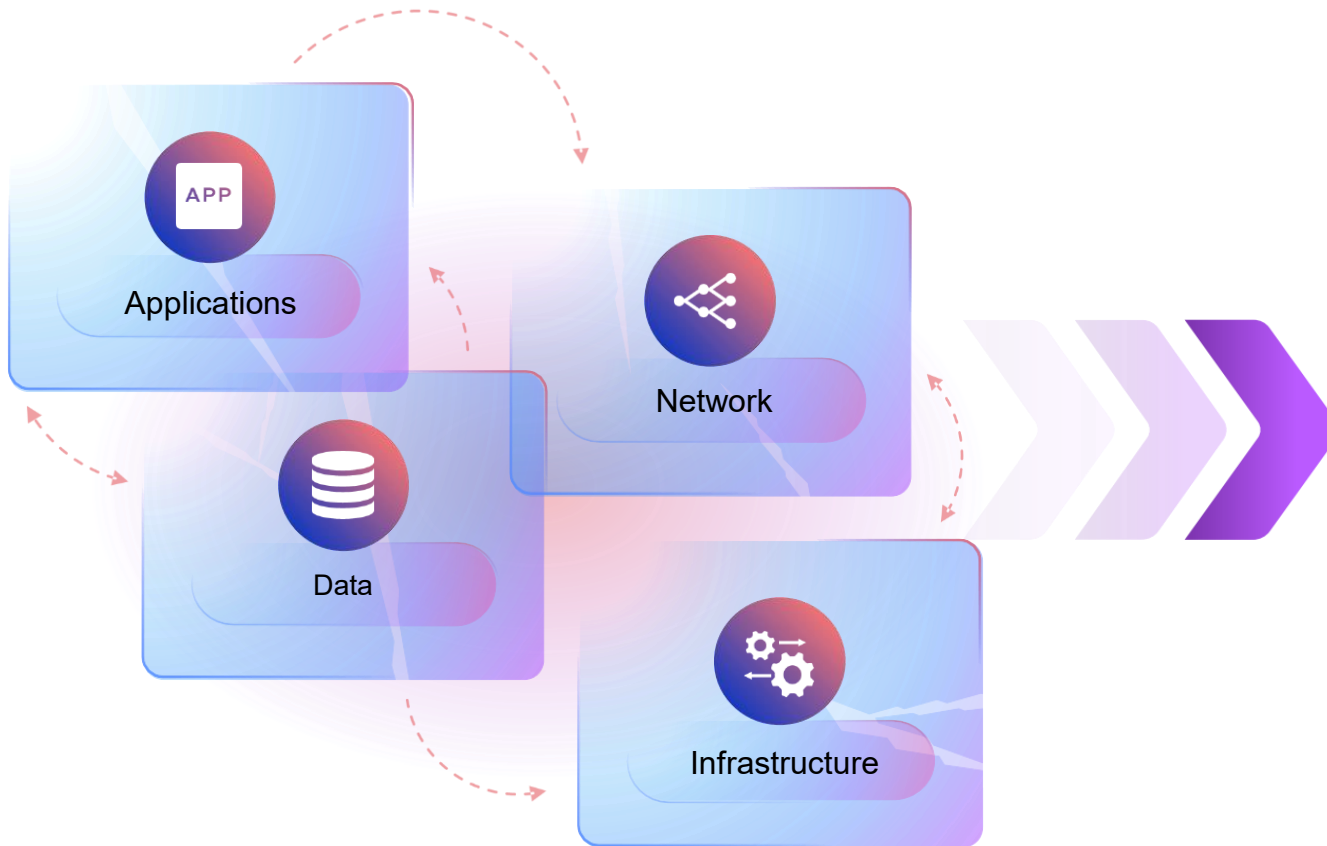


- Rapid recovery from cyber attacks
 - Automated testing with network isolation
 - Integrated recovery workflows
 - Choice of detection vendor
-
- Strong distributed lateral security
 - Signature and behavior-based detection
 - Data exfiltration avoidance
 - Zero-day threat detection
-
- Federated Identity & SSO
 - Live Patching, High Availability
 - Encryption at rest, in transit, and in use
 - Continuous security monitoring*

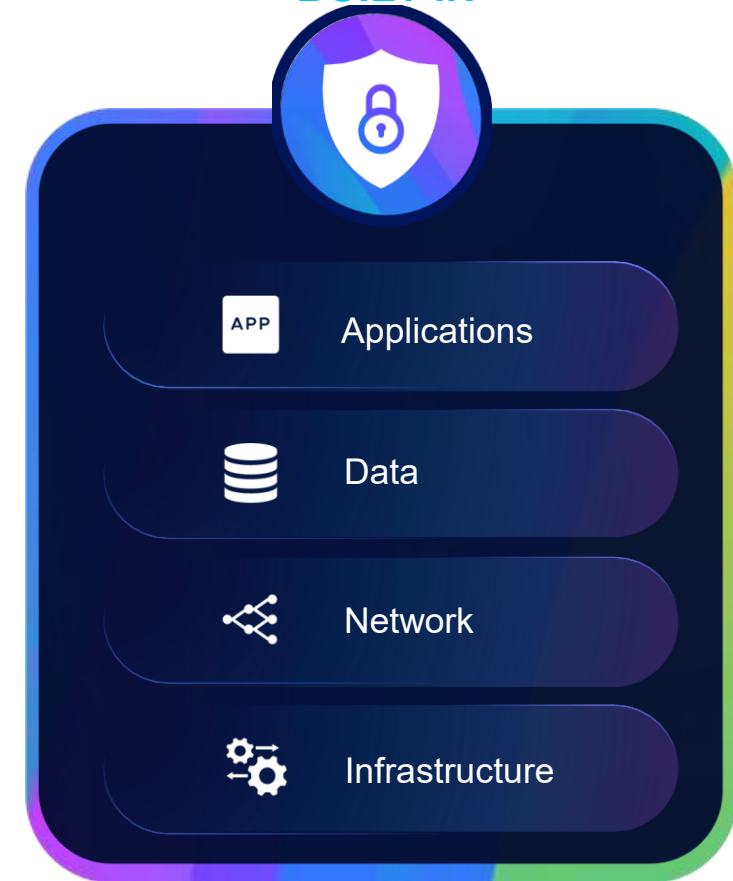
Time to Re-Think Security

PROTECT | DETECT | RECOVER

BOLTED ON



BUILT IN



vDefend & Avi Load Balancer

Comprehensive stack to address AI-fueled security challenges

New Security Challenges

Compute platforms are
frontline targets

Need to restrict lateral movements

Shift to proactive security

Long patch cycles amplify
risk of a breach → Vulnerability
Shielding (Virtual Patching)

Modern Security Solutions

vDefend

Network Detection &
Response

Network Traffic Analysis

Malware Prevention

Distributed IDS/IPS

Gateway Firewall

Distributed Firewall

Security Intelligence
(Analytics & Recommendations)

Avi LB

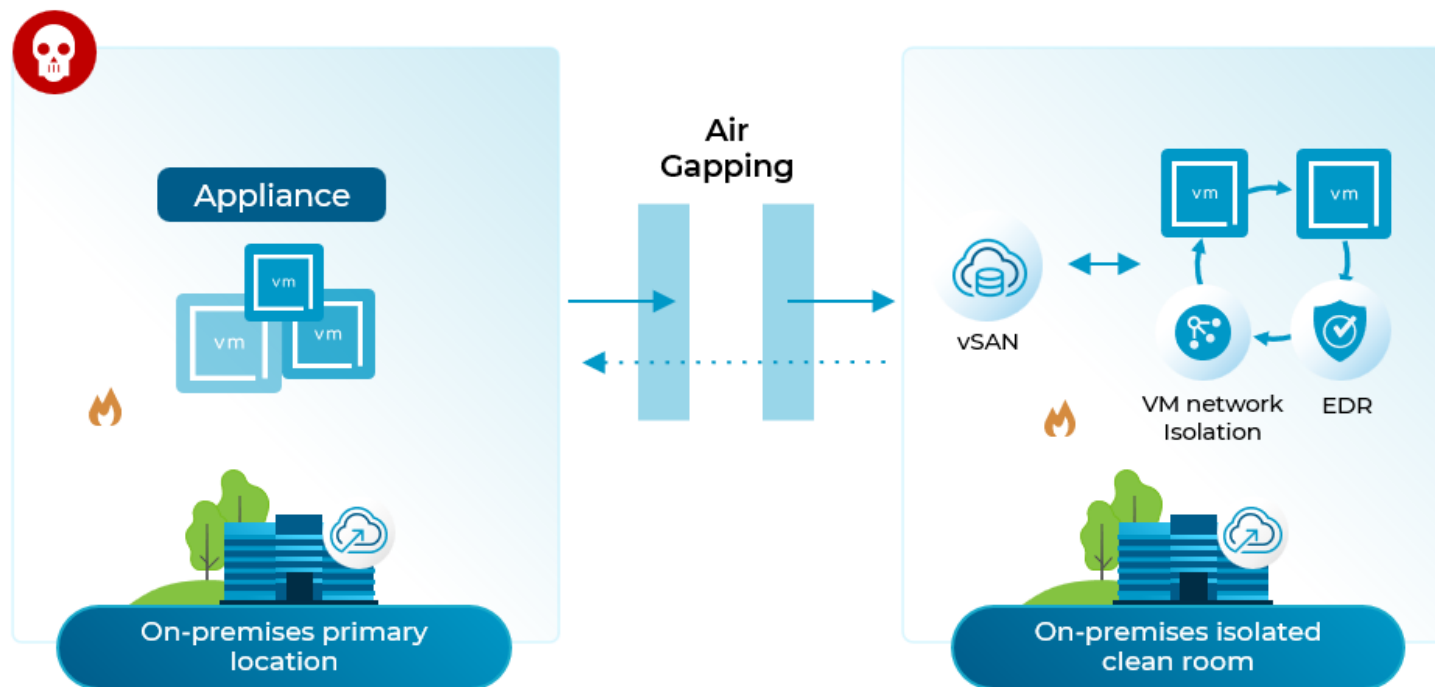
Web App Firewall (WAF)

API Protection

On-Premises Cyber Recovery

Integrated cyber recovery¹ to on-premises VCF isolated clean rooms

END-TO-END WORKFLOW AUTOMATION



- (1) Advanced Service requiring additional licensing
(2) Bring Your Own License required

Customer Benefits

- ❑ **Accelerated and predictive recovery:** End-to-end workflow automation reduces downtime and significantly improves recovery time during cyber incidents.
- ❑ **Higher confidence in clean restores:** Built-in AI/ML validation detects and remediates both fileless and file-based malware, ensuring only clean workloads are restored with confidence.
- ❑ **Operational simplicity at scale:** Centralized management enables creation, monitoring and execution of cyber and disaster recovery operations at scale.
- ❑ **Flexible security integration with CrowdStrike:** Customers can also choose CrowdStrike as an alternative EDR for recovery point validation²

Know Where Your Security Stands

Continuous Compliance Enforcement with VMware ACC

Continuous Compliance Enforcement

Customer Benefits

View ResultsView Control Set

Assessment as of: Jan 28, 2026, 2:01:26 AM

> Overview

>>

REMEDIATEEXPORT AS CSVGENERATE REPORT

>>

☐		Rule	Severity	Component
☐	>>	esx-9.shell-timeout - Set a timeout to limit how long the ESX S...	Critical	ESX
☒	>>	esx-9.dcu-timeout - Set a timeout to automatically terminate ...	Warning	ESX
☐	>>	esx-9.account-lockout-duration - The ESX host must enforce ...	Warning	ESX
☐	>>	esx-9.api-soap-timeout - The ESX host must configure a sessi...	Warning	ESX
☐	>>	esx-9.session-timeout - VMware Cloud Foundation compone...	Warning	ESX

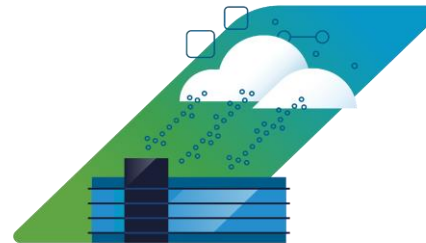
- ☐ **Continuous monitoring and easy remediation workflow** let you know exactly where you stand compared to VCF security baselines and PCI DSS 4.0.1 regulatory compliance standards, making it easy to become compliant.
- ☐ **Proactive drift detection** alerts you when settings change, and audit logs show who changed things, and when.
- ☐ **Unified security posture management** integrated with vCenter cluster configurations mean consistent security controls throughout the stack.

ACC is an Advanced Service, available at extra cost.

Extending Zero-Downtime Patching



Apply most critical security patches with **minimal to no downtime**, across VMware ESX and vCenter.



Reduce operational burden and risk, **reducing the need for extensive planning** and coordination



Respond quickly to new disclosures, shortening the time to a “patched” state across your entire fleet.



Hardware costs never decline...



Virtualize Everything



VCF9 - Control Spending through Virtualization Efficiency



38%

**Lower Memory
and Server TCO¹**

Memory Tiering
with NVMe



34%

**Lower Storage
TCO¹**

vSAN ESA with Global
Dedupe²



3x

**Switching
Performance¹**

NSX Enhanced
Data Path



~1%

**Negligible
Performance
Overhead³**

Compared to Bare Metal



0

Downtime

vMotion for AI

vGPU vMotion
Optimization

The IT Priority

Invest and Innovate in Private Cloud

#1

3-year priority

build new
private cloud
workloads

92%

trust private
cloud security
and compliance

7^{out of} 10

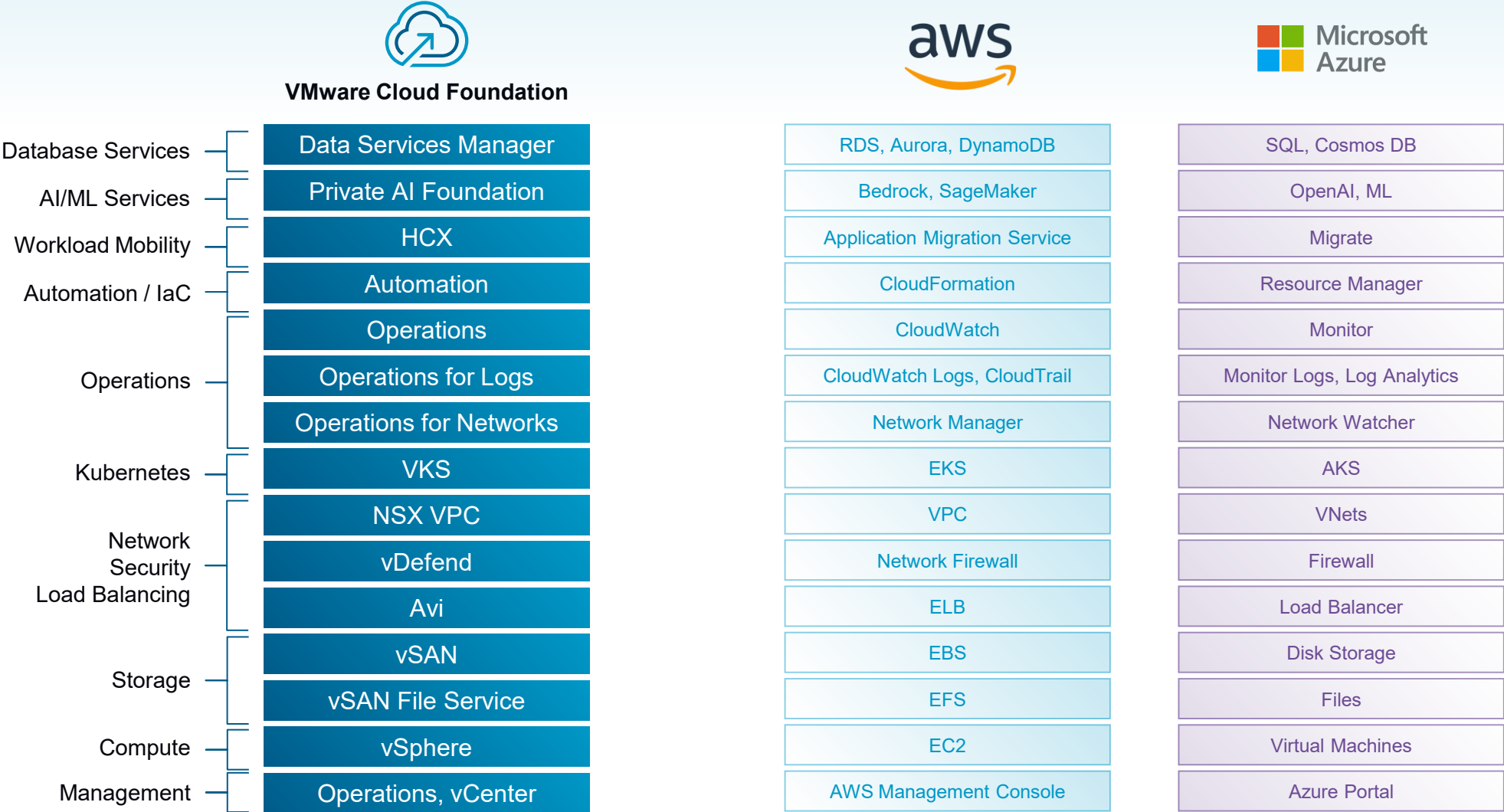
have or plan
to repatriate
workloads from
public to private
clouds

81%

of enterprises
are structuring
their IT teams
around platforms
vs silos

Source: Private Cloud Outlook 2025: The Cloud Reset, a Broadcom Report, May 2025. Survey of 1,800 IT Executives across 11 countries in the Americas, Europe, and Asia.

Visualizing VCF in a different way



From Feedback to Forward

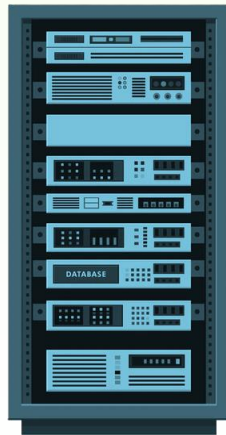
We listened and learnt.

By re-balancing our offering to a customer's environment, we provide everyone with a roadmap to private cloud.



VMware vSphere Foundation

Workload platform delivering enterprise-class storage, optimized IT infrastructure, and containers with built-in Kubernetes.



VMware Cloud Foundation

Private cloud platform delivering the scale and agility of public cloud with the security and performance of private cloud.



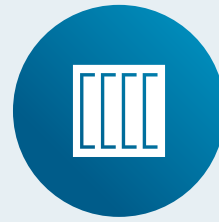
VMs, Containers, AI – On your Private Cloud

One platform across all applications



VMs

The estate you run today.
Reliable, consistent,
efficient.



Containers

The apps being rebuilt.
Scheduled beside the VMs,
not on new hardware.



AI

Models and agents.
GPUs pooled and shared
on the same hosts.

Cost Challenges for Businesses

Run the Company 70-80%

Managing Legacy and Complex IT Systems and the Talent to Run them

Siloed Resource Management, Governance, Security

Complex Compliance, Security, Governance and Resilience

Change the Company 20-30%

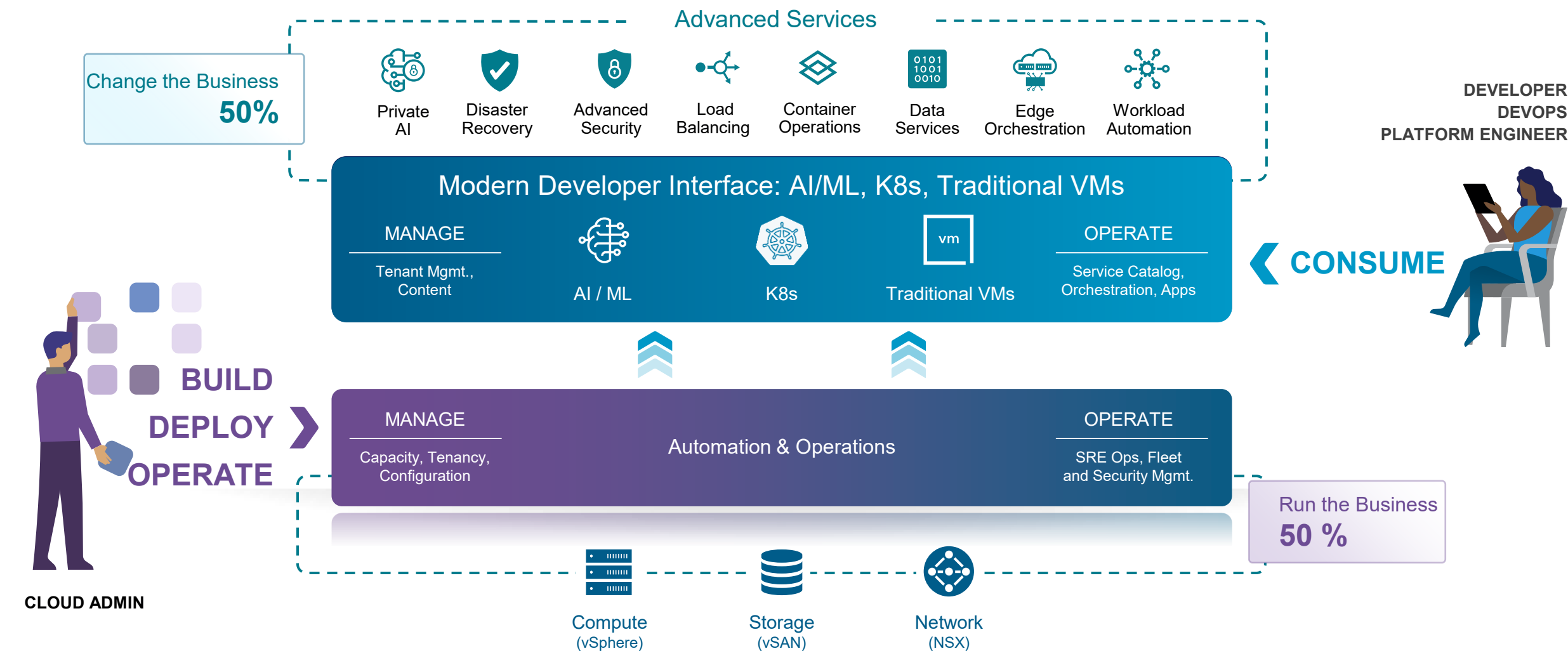
Faster Deployment of Customer Focused Applications

Real Time AI Driven Insights Delivered to Achieve Outcomes

API First & 100% Automated Self-Service Platforms

Business Cost Challenges
50% Change
50% Run

Run the Business vs Change the Business



«« VCF is ... new vSphere »»



THANK YOU!



Adria Forum 2026

