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IDC **01**

03

1.1 03

1.2 05

09

2.1 10

2.2 16

21

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3.3 27

3.4 29

3.5 31

33

4.1 33

4.2 ODM 34

4.3 38

IDC **44**

47

IDC

IDC

2022 2026 2.38

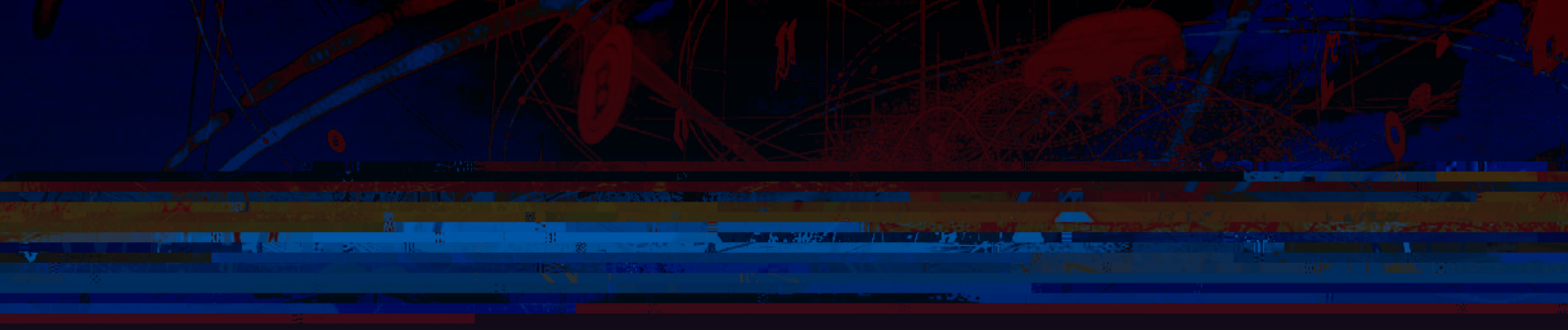
CAGR 18.8%

IDC

1 GDP 3.5 1.8

IDC

ODM



1.1

3.5 6.7

2022

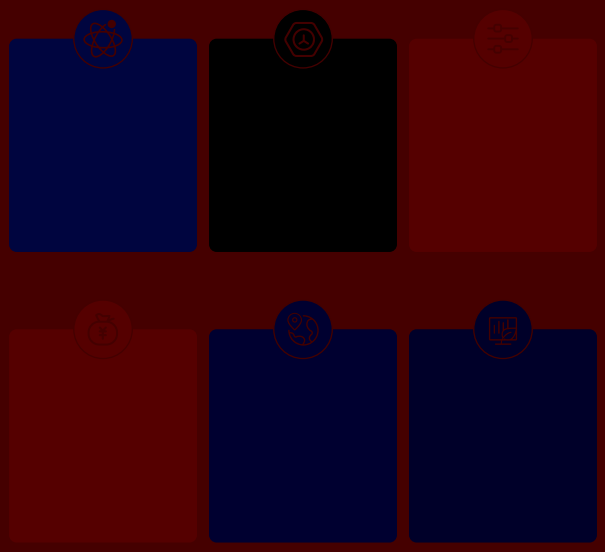
60

GDP 2

1

2035

GDP 2020 7.8%
10% (CAGR 11%)



IDC 2023

“ ”

“ 2522 ”

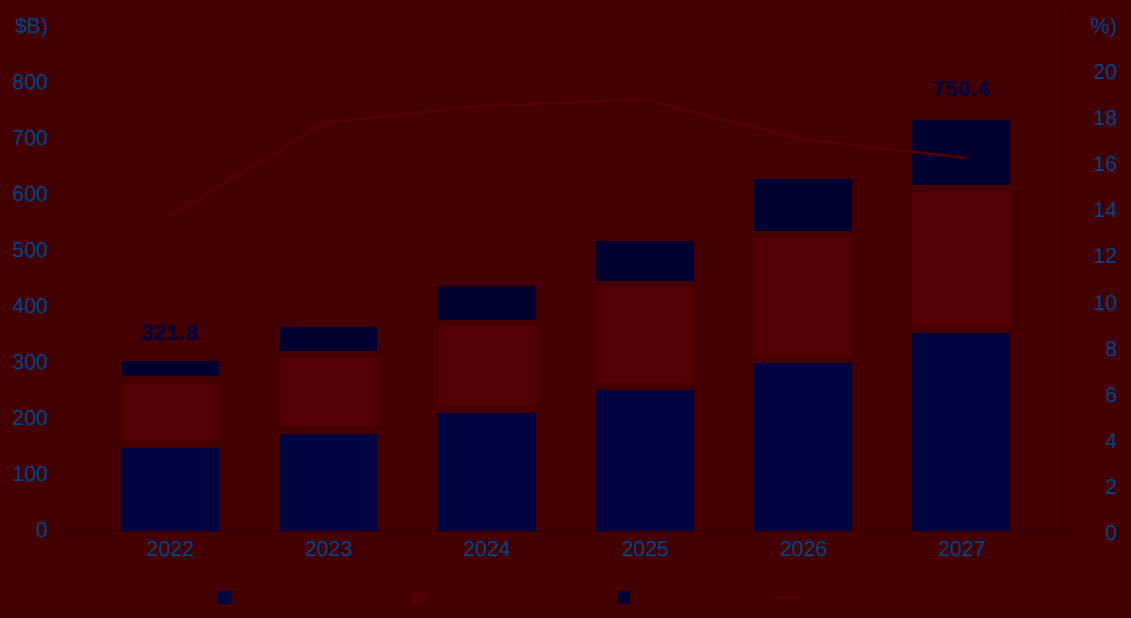
2

5

2

2

2 2022-2027 $B



2022-2027

- CAGR 17.9%
- CAGR 17.0%
- CAGR 23.8%

2022-2027 CAGR

18.5%

IDC 2023

IDC 2023 2027 2.77

2022-2027 CAGR 18.5%

5 49%

2022-2027 CAGR 23.8%

1.2

ICT

ICT

-

- 20 80

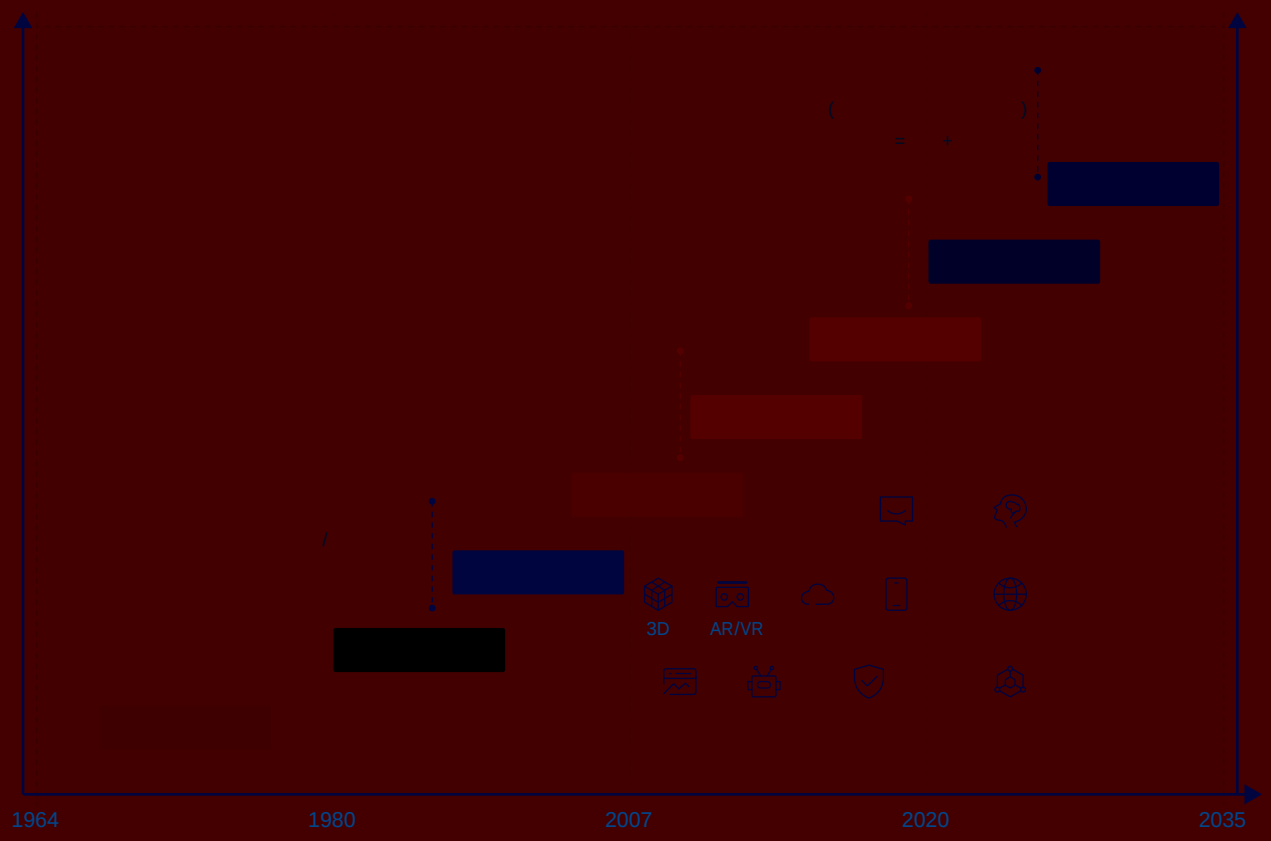
-

3D AR/VR

-

> IDC
> ICT
> 2021–2026
> 8.9%
> GDP
> 2
> 20%

3 ICT



IDC 2023

2023

IDC

2021

12.7%

2026

20% 2021-2026

CAGR

27.9%

/

- - - 5G -

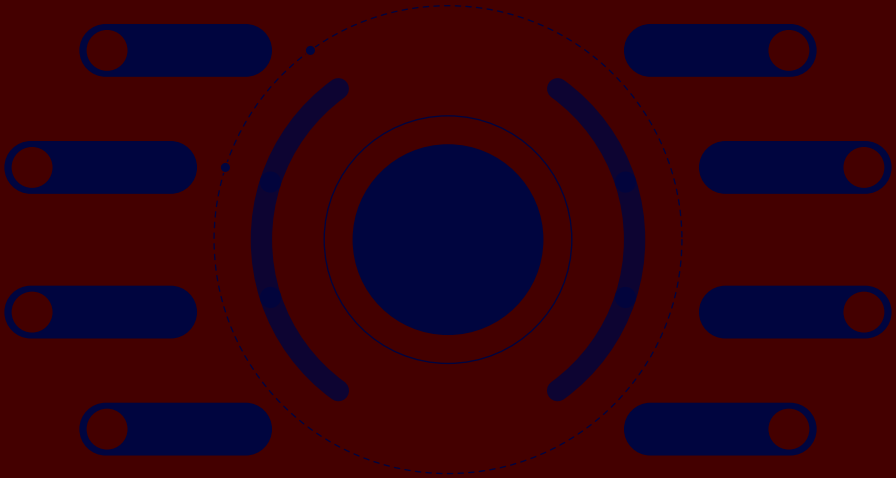
IT

4

IDC 2023

2.1

AR/VR



AR/VR

5G

5G AI

3D VPA HMI

AI

5G

IDC

2022 23.88ZB 2027 76.6ZB CAGR 26.3%

IDC 2024 AI

75% 20% AI AI

AI AI

AI

GPU

IDC 2025

559 IoT 75% 416

- - -

5G

IDC 1 GDP

3.5 1.8

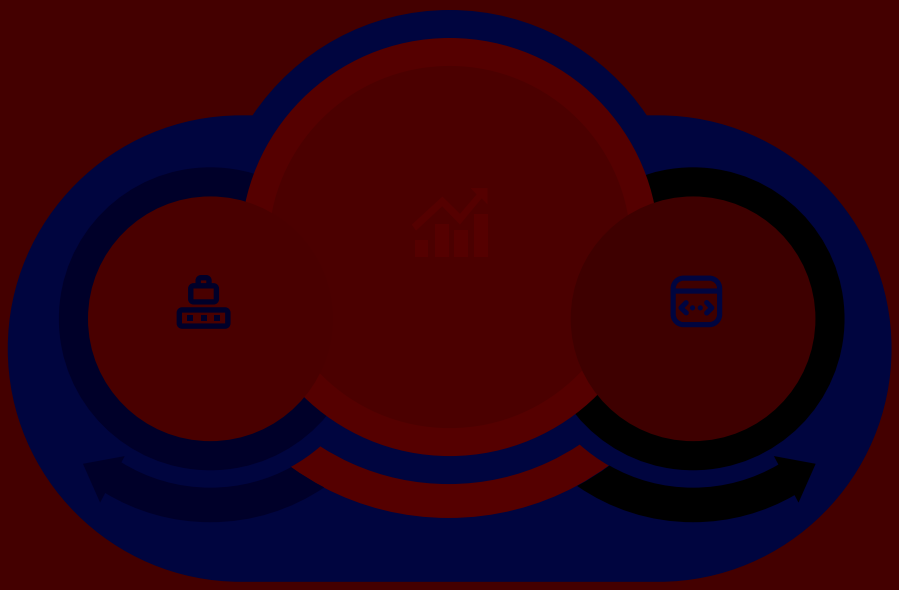
5G

3D AR/VR

3D

2.2

5 IDC



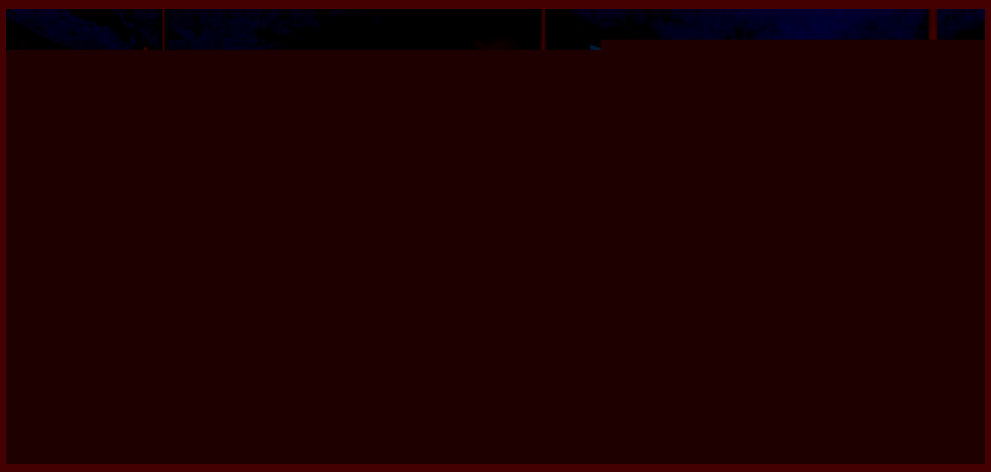
IDC 2023

- /

API

- ML

- IDC



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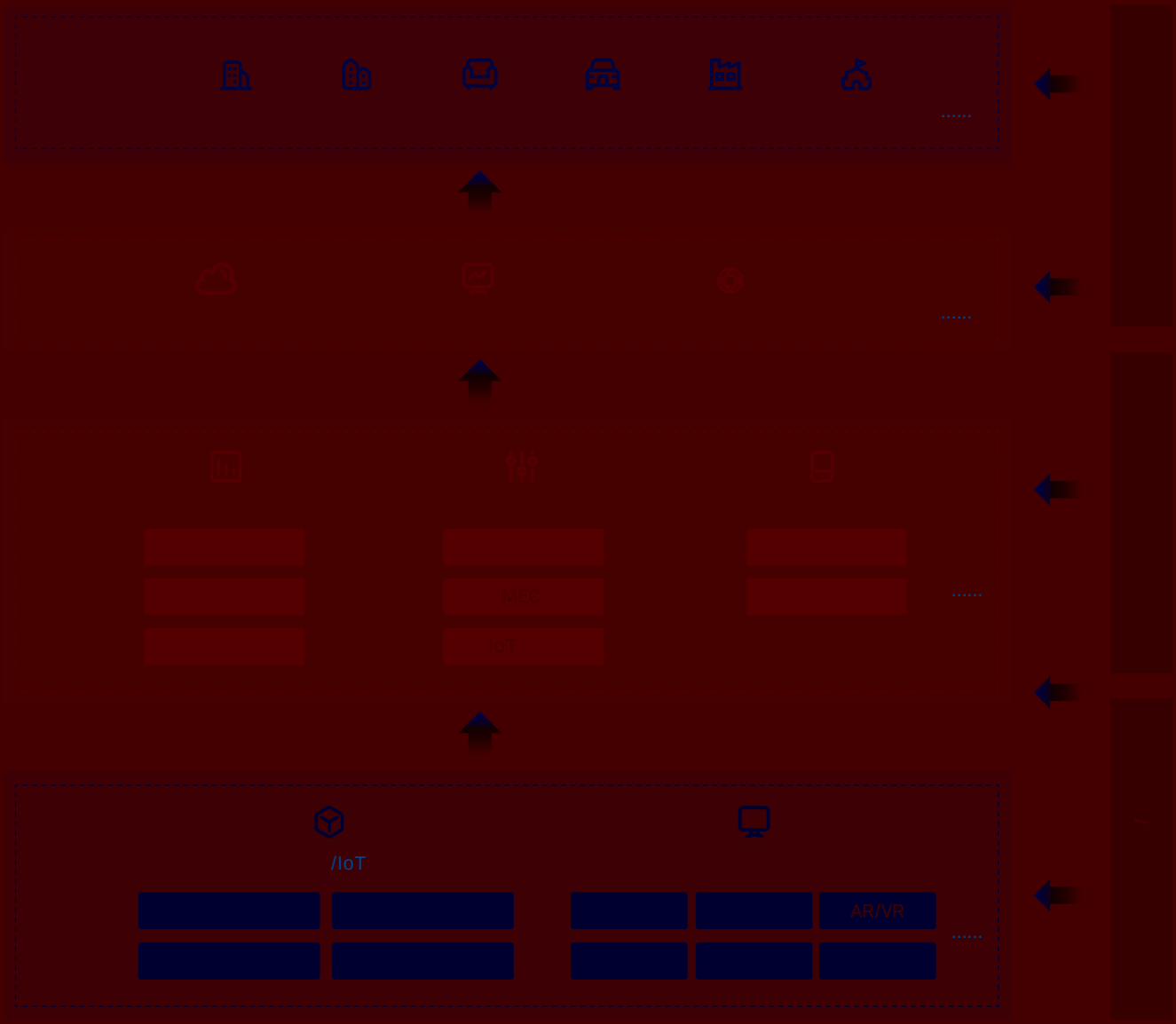


IDC 2023

PC

50%

IDC PC

AR/VR 2027

35 3.7%

12 4 AR/VR

29.0%

5.0% 4.6%

L1 L5 2026 8,930

14.8%

IDC L1

L5 2021 765.8 2025 1,344.0

15.1%

IDC 2026

90.4 2021 2026 5.7%

- IDC 2021 20.9 2025 47 22.5% 28.7%

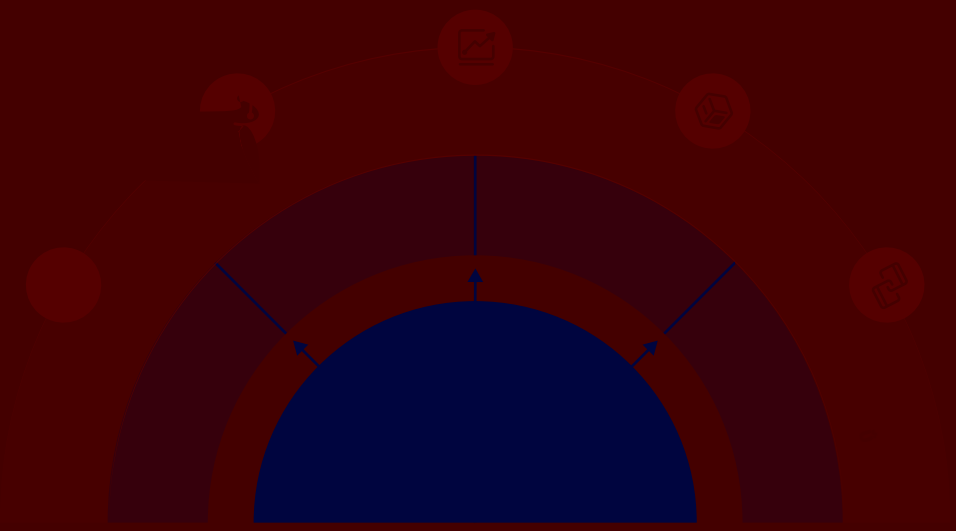
IDC 2022 IT 170 2026 364.9

IDC 2020 2025 40.6% 2025 37.4

- 5G

IDC

7



IDC 2023

3.1

AI

IDC 2021

39.1% 2026

347 21.7%

2022 16.6%

“

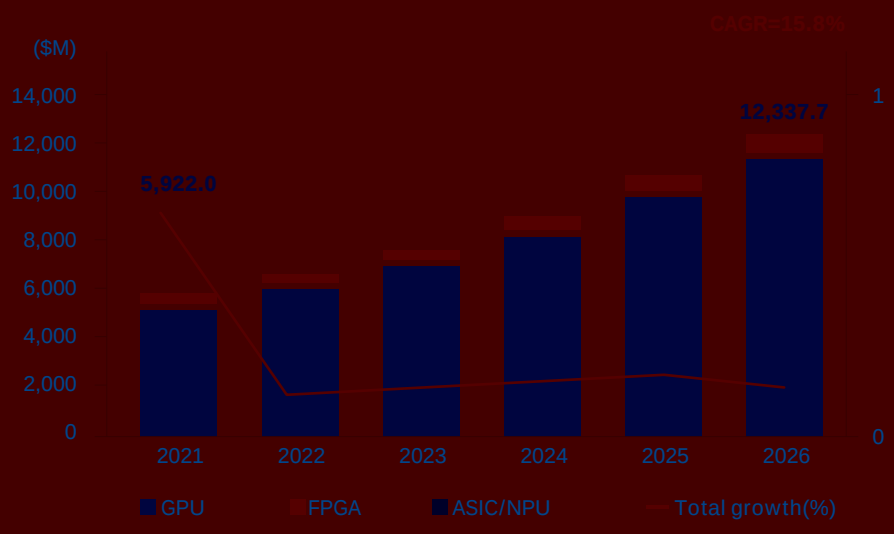
IDC

2021 59

2026 123

15.8%

8 2021-2026 $M



IDC 2023

AI

I/O

SSD

AI

GPU

FPGA

ASIC

GPU FPGA

NPU ASIC CPU+GPU CPU+FPGA CPU+ASIC

IDC

- OpenAI 2012 GPU AlexNet 21 AlphaGo Master AlphaGo Zero 30 3.5 GPU/CPU

- AI AI AI AI IT

3.2

IT

5G

IDC 2022 40.5 2021 19.1% 2021-2026 22.1%

DataOps

3.3

2021

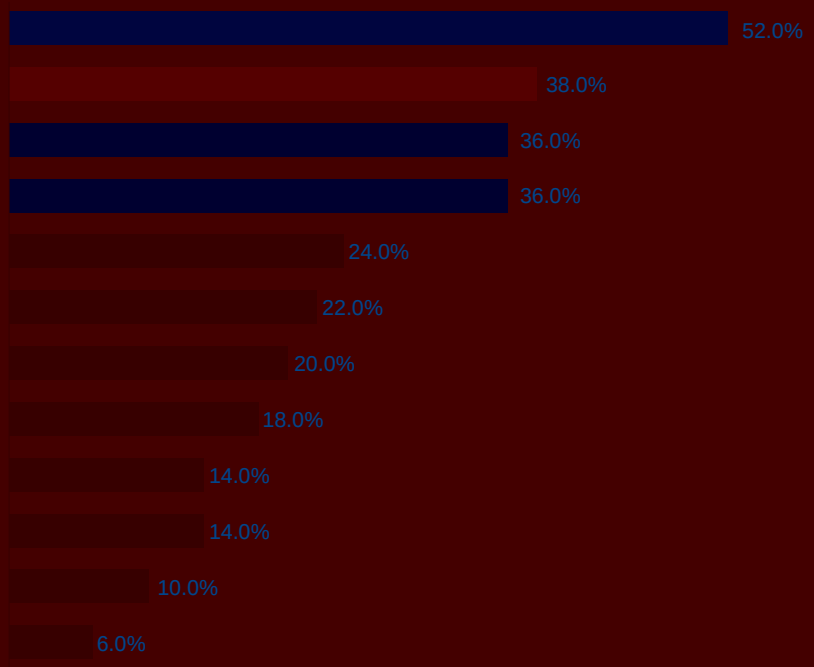
5G

2025

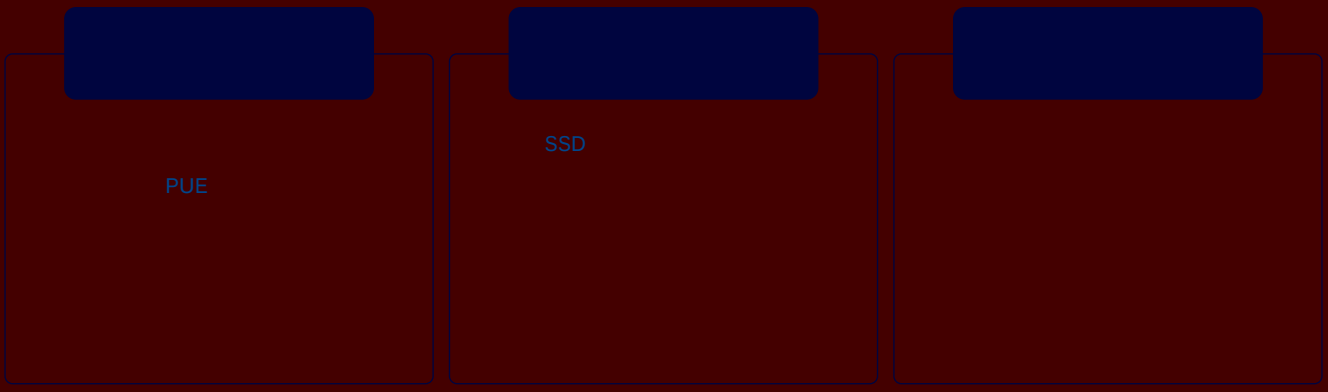
PUE 1.25

10

Q 2022 ?



IDC & IT N=50 2022



- IT

IT

PUE

1.04 30%

IDC

2022 2022

10.1 189.9% IDC 2022-2027

56.6% 2027 95

- SSD

HDD SSD

IO

CPU/GPU

FPGA/ASIC

FPGA+CPU FPGA

3.4

2000

20%

2027 40%

AI

- SaaS SaaS AI
- IDC 2024 IDC 2024 40% 2000
- AI AI AI AI

3.5

IDC / /

5G

GPU

5G

4.1

Hyperscale Data Center

IDC 2027 /

80% 2017 40%

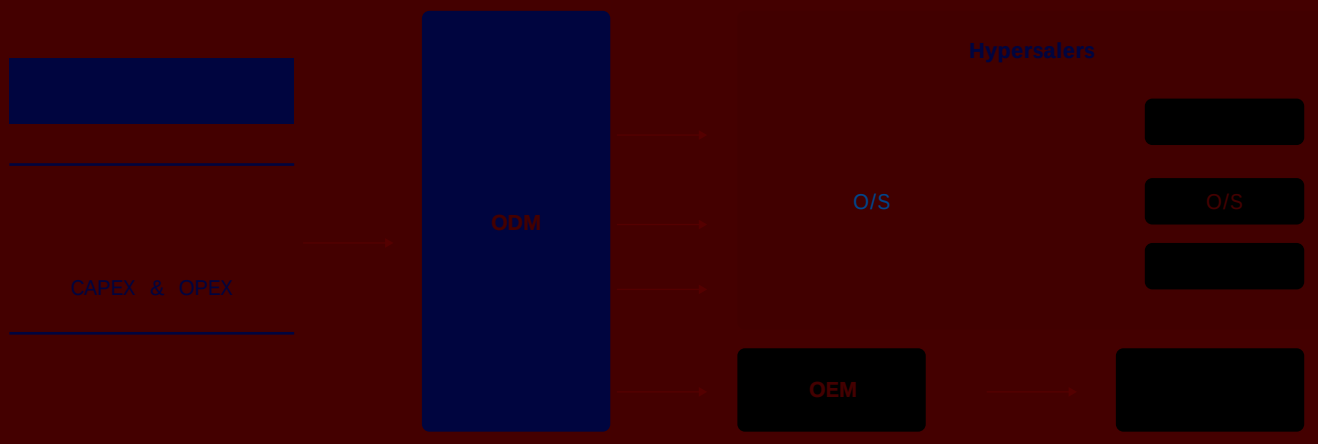
4.2 ODM

Original Design Manufacturer

ODM

ODM ODM Direct

11 ODM-Direct



IDC 2023

ODM Direct

ODM ODM Direct

- ODM

- ODM

ODM

- ODM

IDC 2022 ODM Direct

35.4% 346 22.3%

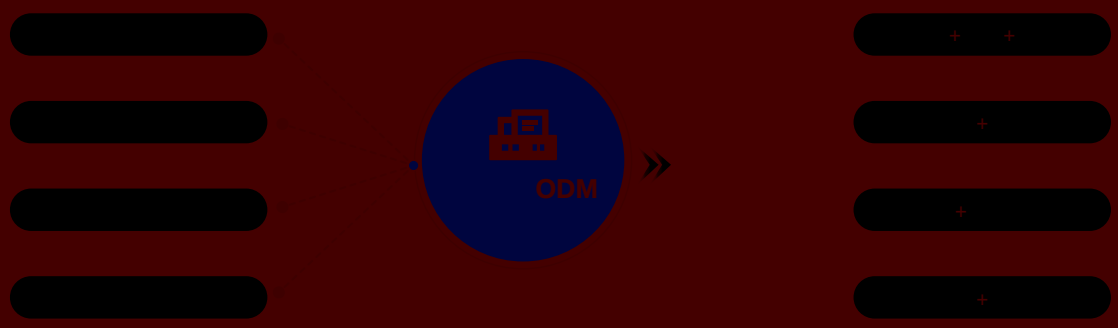
16.8% 2027 ODM Direct 577

10.8% IDC 2022

ODM Direct 14.1%

22 30.1%

ODM **ODM**



IDC 2023

ODM

ODM

ODM

ODM

ICT

AI

AI

ODM

- ODM

ODM

ODM

ODM

ODM

ODM

ODM

ODM

ODM

ODM

- - - - -

Know-How

5G AI

4.3

5G

50 7 5000

51WORLD

51WORLD WDP - - -

:

AI

Know-How

3G/4G/5G

WLAN NB-IOT

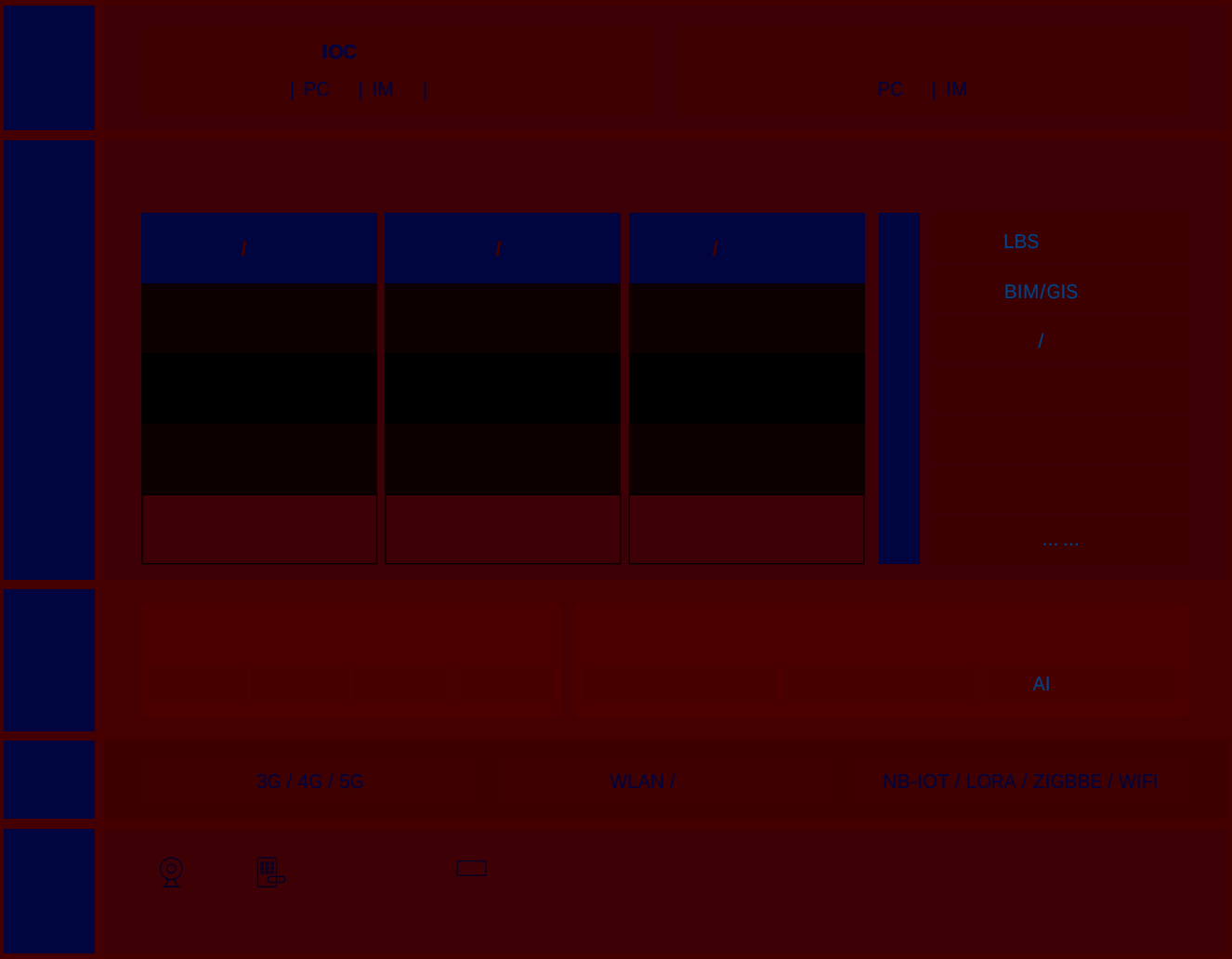
AI 3

3

/ / /

51WORLD WDP 1:1

Intelligent Operation Cente ÿ i


IOC
| PC | IM |
PC | IM
/
/
/
LBS
BIM/GIS
/
... ...
AI
3G / 4G / 5G
WLAN /
NB-IOT / LORA / ZIGBBE / WIFI

IOC

-
-
- AI

-
-

IOC

20% 20%

51WORLD

ODM

AIGC

-
-

ODM

-
-
-
-
-

AIGC AI

AI

3 8

AI

ODM

“

IDC

5G

AI

- + +

SSD

- IT

DDos

- IT

IT

-
-
- **AI**

AI

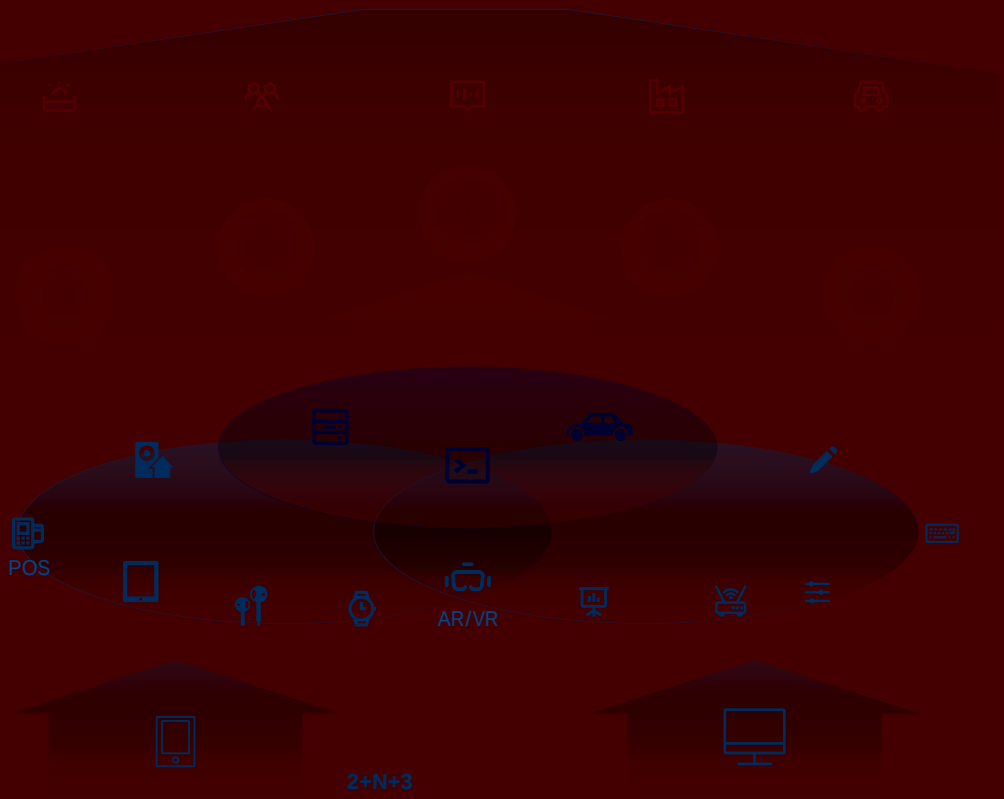
AI

ODM

2+N+3

2022 926

14 2+N+3



2023

ODM

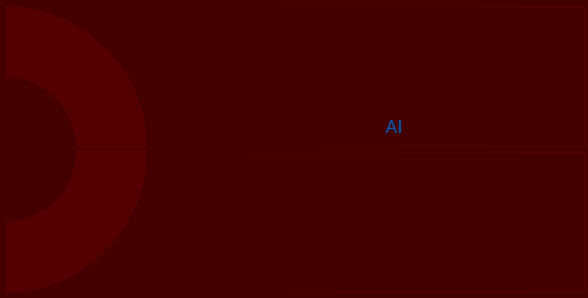
O

M

+

M

15



2023

ODM **AI**

800

FPGA

-

- 5G+UWB+V2X T-Box

-

VCU

2024

AI

AI

- AI AI
  N+ AI AI
- 200+
-
- AI

VR/AR VR/AR
VR/AR

VR/AR
VR/AR

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1100 110

IDC 50 IDC IDC

IDG IDG

IDC China

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