





01

	03
2025	03
	04
2025	05
2025	05

02

“ IP ”	06
	06
100	07
2024	07
	08
280 EFLOPS	08

03

2025	09
	09
2025	10
	10

04

APNIC IPv6 50%	11
APNIC NAT IPv6	11
GARR eduVPN	11

05

2024	12
	12
IDC 210	12
EDUCAUSE 2025	13



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IPv6

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2025

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2025

2025

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“ IP

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IP L4

ICT

IP

IP
L4

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2024				2024	
43255	23638	58885		15.58%	9.8%
12.9%		3.78	1.1	2.6	
	25.2%				

2024				2024	
30		16632	38.5%	30-40	
	10113	42.8%	35		
31497	53.5%				

“ ”

“ ”





100

7

4.01

6.1%

2612

6.5%

AI

AI

2024

AI

8

1 8

179%

122.64%

74.24%

72.48%

10.49%

AI

AI

/

7

4921.9

3%

453.2

5.7%

2024

TOP 10

营业收入(亿元)		同比增长	
29	-6.75%	深信服(安全业务)	36.4
15	-26.44%	启明星辰	33.6
20.29	0.33%	工业富联	24.67
24.67	-19.71%	电科网安	23.58
23.58	40.29%	绿盟科技	30.43
30.43	-5.87%	奇安信	24.67

毛利润(亿元)		同比增长	
32.73	22.78%	奇安信	24.67
42.19%	奇安信	24.67	24.67
19.48	25.17%	启明星辰	33.6
17.21	-8.46%	天融信	36.4
12.69	63.5%	绿盟科技	33.6
12.28	-8.4%	安恒信息	30.43
10.49	36.4%	亚信安全(安全业务)	24.67
11.67%	三六零(安全及其他)	36.4	36.4

营业收入(亿元)		同比增长	
1.02	-6.40%	深信服	36.4
1.61	77.36%	奇安信	24.67
0.42	-37.40%	深信服	36.4
0.42	-37.40%	奇安信	24.67
0.13	126.68%	绿盟科技	33.6
0.48	526.08%	电科网安	23.58



1.

2025

2027

30

1000

6



280 EFLOPS

2024

4.5

61.5%

“

”

2024

41.06



2025

4 18

2025

27

395.18

352.31

(294.48)

(259.14)

(226.09)

(216.22)

64.67%

30%



2025

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2.0 ”,



APNIC IPv6 50%

APNIC Labs IPv6

56 IPv6 30 50%

IPv6 2025 4 22 64% IPv6

50% 45.28% 8.1



2024

2024

30

30

10

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2024

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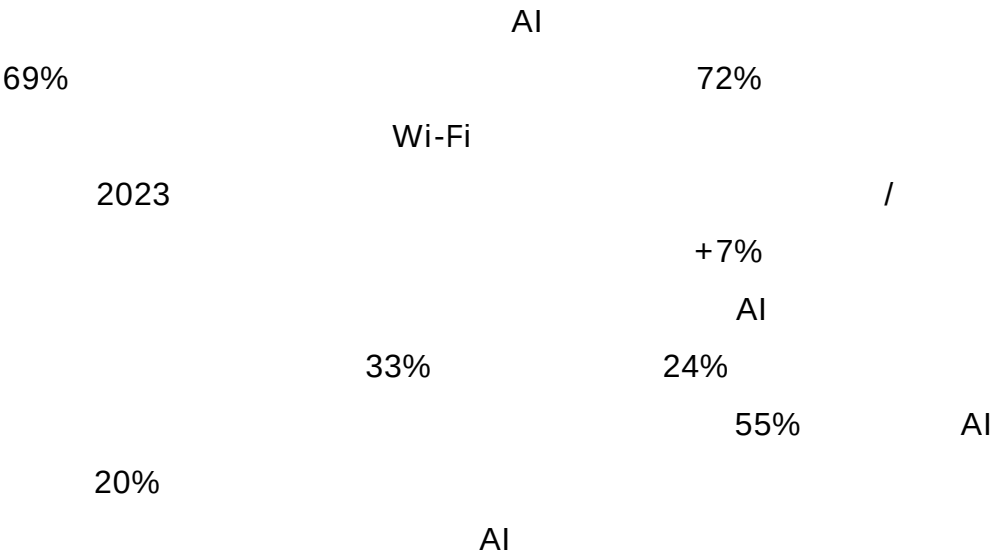
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EDUCAUSE 2025



EDUCAUSE_____

- _____
- _____ 2024 + AI _____
- Brand Finance 2025 150
- _____ & :2025 _____
- _____ & 2024 _____

- _____ AI _____



scgl@cernet.com



赛尔网络
CERNET